

**ORACLE** CRM On Demand

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# Oracle Migration Tool On Demand Guide

Release 34  
February 2017

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# 1

## What's New in This Release

### What's New in Oracle Migration Tool On Demand Guide, Release 34

Table 1 lists the changes that were made in this version of the documentation to support Release 34 of the software.

Table 1. What's New in Oracle Migration Tool On Demand Guide Release 34

|  |   |
|--|---|
| <a href="#">"Oracle Migration Tool On Demand Client" on page 15</a>                      | Modified topic. The list of configuration data that you can extract from Oracle CRM On Demand and import to Oracle CRM On Demand using the Oracle Migration Tool On Demand client has been updated to include the process administration configuration data, which is supported for the first time in Release 34. |
| <a href="#">"Privileges for Administrators" on page 18</a>                               | Modified topic. The privileges that are required for migrating the process administration configuration data have been added to the table of privileges for administrators.   |
| <a href="#">"Migration Dependencies" on page 28</a>                                      | Modified topic. The dependencies for migrating the process administration configuration data have been added to the table of dependencies.  |
| <a href="#">"Location of Output XML Files for Read and ReadAll Commands" on page 31</a>  | Modified topic. The folder name for the output files for the process administration configuration data has been added.  |
| <a href="#">"Elements and Sections in the Search Layout XML Output File" on page 154</a> | Modified topic. A description of the new element, <code>&lt;EnableFirstTargetedFieldAsLookupDefault&gt;</code> , has been added. In addition, the description of the <code>&lt;EnableDivisionAsDefaultSearchField&gt;</code> element has been updated.  |
| <a href="#">"Elements and Sections in the Roles XML Output File" on page 164</a>         | Modified topic. A description of the new element, <code>&lt;ModernThemeName&gt;</code> , has been added. In addition, the description of the <code>&lt;ThemeName&gt;</code> element has been updated.   |
| <a href="#">"Create Task Workflow Action Set" on page 183</a>                            | Modified topic. The new <code>&lt;SubType&gt;</code> child element has been added to the <code>&lt;WorkflowCreateTaskAction&gt;</code> element.   |
| <a href="#">Chapter 29, "Migrating Process Administration Configuration Data"</a>        | New chapter. It describes how to migrate the process administration configuration data.   |

Table 1. What's New in Oracle Migration Tool On Demand Guide Release 34

|  |   |
|--|---|
| <a href="#">“Replicating All Configuration Data from a Source Environment to a Target Environment” on page 263</a>       | Modified topic. Examples of extracting and upserting the process administration configuration data have been added to the procedures. |
| <a href="#">“Replicating Selective Configuration Data from a Source Environment to a Target Environment” on page 270</a> | Modified topic. Examples of extracting and upserting the process administration configuration data have been added to the procedures. |
| <a href="#">“Homepage Section Layout Mapping” on page 425</a>  | Modified topic. The Homepage section layout names for the Asset Homepage have been added.   |

### Additional Changes

This book also contains the following change:

- [“Privilege IDs and Their Corresponding Names and Descriptions” on page 441](#). The following privileges have been deleted from [Table 89 on page 441](#):
  - Enable Offline Access
  - Enable PIM Sync Access

# 2

## Getting Started with Oracle Migration Tool On Demand

This chapter describes how to start using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Oracle Migration Tool On Demand Client on page 15](#)
- [Software Requirements for Installing Oracle Migration Tool On Demand on page 18](#)
- [Downloading the Oracle Migration Tool On Demand Client on page 25](#)
- [Installing and Configuring the Oracle Migration Tool On Demand Client on page 25](#)
- [Starting the Oracle Migration Tool On Demand Client on page 26](#)
- [Migration Dependencies on page 28](#)
- [Commands for Oracle Migration Tool On Demand on page 30](#)
- [Specifying Internet Proxy Server Information on page 33](#)
- [XML Templates and Web Services Description Language on page 34](#)
- [Considerations for Using the Oracle CRM On Demand Migration Tool Client on page 35](#)

**CAUTION:** As a company administrator using the Oracle Migration Tool On Demand client, you must understand its functionality and capabilities. Failure to do so might result in unintended changes to your environment. You must back up your existing configuration data for Oracle CRM On Demand before using the Oracle Migration Tool On Demand client. Oracle will not be responsible for any damage incurred from improper use of the Oracle Migration Tool On Demand client.

## Oracle Migration Tool On Demand Client

The Oracle Migration Tool On Demand client is a command-line based utility that uses the Administrative Web services in Oracle CRM On Demand to extract configuration data from Oracle CRM On Demand and to import configuration data to Oracle CRM On Demand. The Oracle Migration Tool On Demand client allows you to download customized configuration data from one Oracle CRM On Demand environment to your local machine, and then to import that configuration data to another Oracle CRM On Demand environment, thus eliminating the need to manually reproduce the customized configuration data from one Oracle CRM On Demand environment to another. For example, you can download the customized configuration data from a customer test environment, and then import it to a production environment.

The type of configuration data that you can extract from Oracle CRM On Demand, and import to Oracle CRM On Demand, includes the following:

- Access profiles
- Action bar layouts
- Assignment rule groups

- Assignment rules
- Cascading picklists
- Concatenated fields
- Custom field definitions
- Customized record types
- Custom HTML head tag additions
- Custom Web applets (for Homepages, Detail pages, Action bar, and the Home tab)
- Custom Web links
- Custom Web tabs
- Dynamic page layouts
- Field audit setup
- Homepage layouts
- List access and order layouts
- Modification tracking settings
- Page layouts (field information, related information, and sections)
- Picklists
- Picklist value groups
- Process administration
- Related information layouts
- Role associations for report folders
- Roles
- Sales assessment templates
- Sales categories
- Search layouts
- Workflow rules and actions

Your ability to perform tasks through the Oracle Migration Tool On Demand client is subject to the same restrictions as your ability to perform the same tasks in the Oracle CRM On Demand user interface. Typically, if you are not able to perform a task in the user interface, then you cannot perform the equivalent task in the Oracle Migration Tool On Demand client, for example, delete an access profile, edit a field type, and so on.



The Oracle Migration Tool On Demand client verifies that you are using the latest version of the client. If you run a command on the Oracle CRM On Demand server using an unsupported version, then you are prompted to download the latest version of the Oracle Migration Tool On Demand client. In addition, when you download the Oracle Migration Tool On Demand client from an Oracle CRM On Demand environment, a version argument with a value that corresponds to the release of Oracle CRM On Demand that is running on that environment is applied to all of your requests by default. So, the configuration data that is returned by Oracle Migration Tool On Demand client reflects the configuration data that is available in that version of Oracle CRM On Demand. For example, if you download the Oracle Migration Tool On Demand client from an environment that is running Release 32 of Oracle CRM On Demand, then the configuration data that is returned for your requests is the configuration data that is available in Release 32 of Oracle CRM On Demand.

## Auditing and Log Files

All Web service operations in the customer test environment are audited. All successful operations as well as processing errors, such as Request Size exceeded, Invalid SOAP request, rate-limit error, and so on, are audited. You can view the audit records in the Web Services Utilization section in Oracle CRM On Demand (click Admin, and then Web Services Utilization).

You can view the Oracle Migration Tool On Demand client log files on your local machine in the *Installation directory\log* directory, for example:

C:\Oracle Migration Tool On Demand\log

## Supported Operating Systems for Oracle Migration Tool On Demand

Although the Oracle Migration Tool On Demand client might successfully migrate configuration data on any operating system that supports extraction of a ZIP file, the client has been fully tested only on Microsoft Windows. The Oracle Migration Tool On Demand client is supported on the following Microsoft Windows operating systems:

- Microsoft Windows 2000 Professional Edition
- Microsoft Windows XP Professional and Home Version
- Microsoft Windows Vista Enterprise Edition
- Microsoft Windows 7

## Supported Releases of Oracle CRM On Demand

The Oracle Migration Tool On Demand client supports exporting and importing configuration data between any two Oracle CRM On Demand tenants on the same release (for example, two Release 34 tenants). In addition, the version of the Oracle Migration Tool On Demand client you are using must be the same as the release of Oracle CRM On Demand with which you are working (for example, you cannot use the current version of the Oracle Migration Tool On Demand client on a previous release of Oracle CRM On Demand).

Typically, the patch level between two Oracle CRM On Demand tenants does not impact migration. However, the introduction of a new configuration attribute or a new attribute in the Oracle CRM On Demand programming interface API in a patch might impact the migration. For example, if a new configuration attribute is added to field management, then you must remove that value from the migration request to an older patch level, because the older patch level does not support that field value.

## Software Requirements for Installing Oracle Migration Tool On Demand

The Oracle Migration Tool On Demand client has the following software requirements:

- Java Runtime Environment (JRE) 1.6 or later installed on your computer
- A ZIP utility (for example, WINZIP) to extract the files to your computer
- Appropriate access to set the environment variables on your computer

## Checking Your Java Runtime Environment

To check whether you have the correct version of the Java Runtime Environment (JRE) installed on your computer, complete the following procedure.

### *To check your Java Runtime Environment (JRE)*

- 1 On your Windows computer, open the Control Panel.
- 2 In the Control Panel:
  - For Classic View, double-click the Java icon
  - For Category View, select the Other Control Panel Options, and click the Java icon

**NOTE:** If the Java icon does not exist, then you do not have JRE installed. To get the latest version, go to <http://www.java.com>.
- 3 Within the Java Control Panel window, click the Java tab, then click the View button for Java Application Runtime Settings.
- 4 Under the Platform column, verify that version 1.6 or later exists, and that it is set up.

## Privileges for Administrators

Table 2 on page 19 shows the privileges that are required to use the Oracle Migration Tool On Demand client to customize the configuration data for various Oracle CRM On Demand objects. Typically, only users who are administrators are given the necessary privileges to customize configuration data.

In addition to the privileges shown in [Table 2 on page 19](#), users require the Data Management: Import privilege and the Data Management: Export privilege to download the Oracle Migration Tool On Demand client. Also, Web services must be set up on Oracle CRM On Demand. For more information about Web services, see *Oracle Web Services On Demand Guide*, available from the Oracle CRM On Demand documentation library on Oracle Technology Network (OTN) and from the Oracle CRM On Demand application by clicking Admin, Web Services Administration, and then Download Documentation.

For more information about enabling privileges, see the information about role management in *Oracle CRM On Demand Online Help*.

Table 2. Required Privileges for Customizing Configuration Data

| Feature Name                                | User Level Privileges   | Object Level Privileges   | Additional Notes                                     |
|---|---|---|--|
| Access Profiles                             | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Manage Roles and Access</li> </ul>   | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | None   |
| Action Bars                                 | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>     | None  | None   |
| Assignment Rule Groups and Assignment Rules | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Data Rules and Assignment</li> </ul> | None  | None   |
| Cascading Picklists                         | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>     | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | Cascading picklists must be supported by the object. |
| Concatenated Fields                         | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>     | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | None   |

Table 2. Required Privileges for Customizing Configuration Data

| Feature Name   | User Level Privileges   | Object Level Privileges  | Additional Notes  |
|--|---|--|---|
| Custom Fields (Field Management)   | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>   | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.  | See <a href="#">Additional Notes and Requirements</a> : |
| <p><b>Additional Notes and Requirements:</b></p> <ul style="list-style-type: none"> <li>■ Field Management must be supported for the object.</li> <li>■ The object must be set up for field renaming, if the operation is Upsert.</li> <li>■ The object must be set up for new fields, if the operation is Create.</li> <li>■ Advanced Field Management must be set up if the &lt;ValidationErrorMsg&gt;, &lt;ValidationExpression&gt;, or &lt;PostDefault&gt; elements are modified.</li> <li>■ The Integration Tag can be changed only if renaming is allowed on that object.</li> <li>■ A multi-select picklist can be created or updated only if it is set up for the object.</li> </ul> |   |  |   |
| Customized Record Types  | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>   | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.  | None  |
| Custom HTML Head Tag Additions   | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Upload Client Side Extensions and Manage Custom HTML Head Tag</li> </ul> | None   | None  |
| Custom Web Applets   | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Manage Custom Web Applets</li> <li>■ Customize Application</li> </ul>    | Detail page custom Web applets and Homepage custom Web applets require Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | None  |
| Custom Web Links   | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>   | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.  | None  |

Table 2. Required Privileges for Customizing Configuration Data

| Feature Name                  | User Level Privileges   | Object Level Privileges   | Additional Notes |
|-------------------------------|---|---|------------------|
| Custom Web Tab                | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> <li>■ Manage Roles and Access (for Read operations only)</li> </ul>     | None  | None             |
| Dynamic Page Layouts          | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application - Manage Dynamic Layout</li> </ul>   | None  | None             |
| Field Audit Setup             | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Administer Field Audit</li> </ul>  | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | None             |
| Homepages                     | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> <li>■ Customize Application - Manage Homepage Customizations</li> </ul> | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | None             |
| List Access and Order Layouts | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> <li>■ Manage Public Lists</li> <li>■ Manage Roles and Access</li> </ul> | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | None             |

Table 2. Required Privileges for Customizing Configuration Data

| Feature Name  | User Level Privileges   | Object Level Privileges   | Additional Notes                                  |
|---|---|---|---|
| Modification Tracking Settings (Enable Modification Tracking) | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Manage Modification Tracking</li> <li>■ Manage Roles and Access</li> </ul> | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | No  |
| Page Layouts  | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>   | None  | None  |
| Picklists   | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>   | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | Field management must be supported by the object. |
| Picklist Value Group  | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>   | None  | None  |
| Process Administration  | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Process Administration</li> </ul>  | None  | None  |
| Related Information Layouts                                   | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>   | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | None  |
| Role Associations for Report Folders (Report Folders)         | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Manage Content</li> </ul>  | None  | None  |
| Roles   | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Manage Roles and Access</li> </ul>   | None  | None  |

Table 2. Required Privileges for Customizing Configuration Data

| Feature Name               | User Level Privileges  | Object Level Privileges   | Additional Notes |
|----------------------------|--|---|------------------|
| Sales Assessment Templates | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Manage Assessments Access</li> <li>■ Manage Content</li> </ul>  | None  | None             |
| Sales Categories           | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Manage Data Rules - Manage Sales Stage Definition</li> </ul>  | None  | None             |
| Search Layouts             | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Customize Application</li> </ul>  | Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on. | None             |
| Workflow Rules and Actions | <ul style="list-style-type: none"> <li>■ Enable Web Services Access</li> <li>■ Manage Data Rules - Manage Workflow Rules</li> <li>■ Manage Data Rules - Manage Workflow Rules for Users</li> <li>■ Workflow Cancel Save</li> </ul> | None  | None             |

## Privileges for Nonadministrative Users

Users who have the Enable Web Services Access privilege in their role can use the Oracle Migration Tool On Demand client to extract the configuration data for certain features. However, the Enable Web Services Access privilege on its own does not allow a user to customize any configuration data using the client. [Table 3](#) shows the configuration data that the Enable Web Services Access privilege allows users to extract, even if their role does not include any other administrator privileges.

Table 3. Features and Commands Enabled by the Enable Web Services Access Privilege

| Feature Name                     | Commands         |
|----------------------------------|------------------|
| Cascading Picklists              | Read and ReadAll |
| Concatenated Fields              | Read and ReadAll |
| Customized Record Types          | Read and ReadAll |
| Custom Web Applets               | Read and ReadAll |
| Dynamic Page Layout              | Read and ReadAll |
| Custom Fields (Field Management) | Read and ReadAll |
| Page Layout Fields               | ReadAll          |
| Page Layout Related Information  | ReadAll          |
| Page Layout Sections             | ReadAll          |
| Picklists                        | Read and ReadAll |
| Picklist Value Groups            | Read and ReadAll |
| Related Information Layouts      | Read and ReadAll |
| Workflow Rules and Actions       | Read and ReadAll |

**NOTE:** To download the Oracle Migration Tool On Demand client, users require the Data Management: Import privilege and the Data Management: Export privilege.

## Language Considerations When Migrating Configuration Data

To migrate configuration data, for example, an access profile, the same languages that are set up in the XML file or source company must be set up in the target company. For example, if the XML file contains definitions for English, French, and Traditional Chinese, and the target company has definitions for English, French, and German, then an Upsert operation fails. The number of languages is the same but the operation does not succeed because Traditional Chinese is not set up in the target company. However, if the XML file contains English and French definitions and the target company has definitions for English, French, and German, then the Upsert operation succeeds because for any language that has not been defined (in this case, German), the system name is used. A *system name* is a name that identifies an object uniquely in the Oracle CRM On Demand application.



## Downloading the Oracle Migration Tool On Demand Client

To download the Oracle Migration Tool On Demand client from Oracle CRM On Demand, the user account must have the following privileges assigned:

- Data Management: Export
- Data Management: Import

For information about setting and checking privileges, see the information about user roles in *Oracle CRM On Demand Online Help*.

### *To download the Oracle Migration Tool On Demand client*

- 1 Create a directory on your computer in which to extract the Oracle Migration Tool On Demand client files, for example:

C: \Oracle Migration Tool On Demand

- 2 Sign in to Oracle CRM On Demand, and click Admin.
- 3 Under Data Management Tools, click Import and Export Tools.
- 4 Under Metadata Import and Export Tools, click Oracle Migration Tool On Demand.
- 5 Save the ZIP file on your computer in the directory that you created, for example:

C: \Oracle Migration Tool On Demand

## Installing and Configuring the Oracle Migration Tool On Demand Client

Complete the following procedure to install and set up the Oracle Migration Tool On Demand client.

It is recommended that you set the environment variables in the following procedure at the system level on which the Oracle Migration Tool On Demand client is installed, so that all users of the computer can run the client.

**NOTE:** Even though a user can successfully run the Oracle Migration Tool On Demand client, it does not mean that he or she can read and load company configuration data successfully. The user must have the sign-in credentials to access Oracle CRM On Demand and the appropriate privileges to read and load configuration data.

### *To install and configure the Oracle Migration Tool On Demand client*

- 1 Extract the contents of the Oracle Migration Tool On Demand ZIP file in the directory that you created in [Step 1](#) of the procedure in “[Downloading the Oracle Migration Tool On Demand Client](#)” on [page 25](#). For example:

C: \Oracle Migration Tool On Demand

- 2 Navigate to the Environment Variables applet on your Windows computer by right-clicking My Computer, selecting Properties, then clicking the Advanced Tab, and then clicking Environment Variables.
- 3 In the Windows Environment Variables applet, set the following environment variables on your computer:

Variable Name=JAVA\_HOME,  
Variable Value=*path of JRE 1.6 or later*

For example:

C:\Program Files\Java\jre1.6.0\_10

Set this variable if it is not already set.

Variable Name=MIGRATIONTOOL\_HOME,  
Variable Value=*path of where the tool is installed*

For example:

C:\Oracle Migration Tool On Demand

## Starting the Oracle Migration Tool On Demand Client

After you have configured the Oracle Migration Tool On Demand client, you can start it using the following steps.

### *To start the Oracle Migration Tool On Demand client*

- 1 Open a command line window.
- 2 Navigate to the directory where you have extracted the Oracle Migration Tool On Demand client, for example:

C:\Oracle Migration Tool On Demand

- 3 Run the Oracle Migration Tool On Demand client from the command line:

```
migrationtool -u UserID -s ServerURL [-f "LogFile"] [Read | ReadAll | Upsert | Delete] [Type] [Parm1] [Parm2] [Parm3]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL of the Oracle CRM On Demand server where your company resides.
- *LogFile* designates the name and location of the log file from the Oracle Migration Tool On Demand client run. For example:

```
set outputDir=Oracle Migration Tool On Demand\test
```

```
migrationtool -u USERNAME -s http://slcxxxxxx.us.oracle.com:30090 -f  
"D:\%outputDir%\test.log" ReadAll FieldManagement
```

This parameter is optional. If you do not specify this parameter, then the Oracle Migration Tool On Demand client stores the log file in the default location, *install\_dir\log* (for example, C:\Oracle Migration Tool On Demand\log). For more information about logging, see [“Auditing and Log Files” on page 17](#).

**NOTE:** Quotation marks are required only if the path or file name contains spaces.

- *Type* is the type of configuration data that you are migrating. For example, for access profile configuration data, use `AccessProfile`.

**NOTE:** The detailed syntax for running Oracle Migration Tool for each specific type of configuration data that you are migrating is provided in the chapter corresponding to that configuration data. For example, to migrate access profiles, see [Chapter 16, “Migrating Access Profiles.”](#) It is recommended that you refer to the examples in each chapter that correspond to the configuration data that you are migrating.

- `[Parm1]` `[Parm2]` `[Parm3]` are optional parameters, for example `-proxyserver` to specify a proxy server and `-proxid` to specify the proxy server user ID. For more information about specifying proxy servers, see [“Specifying Internet Proxy Server Information” on page 33](#).

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Migration Dependencies

Due to dependencies between objects, you must migrate some objects before or after others. [Table 4](#) shows a recommended sequence based on object dependencies.

Table 4. A Recommended Sequence for Migrating Objects

| Object                      | Dependencies  | For More Information  |
|-----------------------------|---|---|
| Customized Record Types     | Must be migrated before fields.   | <a href="#">Chapter 3, "Migrating Customized Record Types"</a>      |
| Custom Web Tabs             | Must be migrated before page layout.  | <a href="#">Chapter 4, "Migrating Custom Web Tabs"</a>              |
| Custom Fields               | Must be migrated before action bar layout and page layout.                                      | <a href="#">Chapter 5, "Migrating Custom Fields"</a>                |
| Picklist Values             | Must be migrated after fields and before cascading picklists.                                   | <a href="#">Chapter 6, "Migrating Picklist Values"</a>              |
| Cascading Picklists         | Must be migrated after picklist values and before page layout.                                  | <a href="#">Chapter 8, "Migrating Cascading Picklists"</a>          |
| Picklist Value Groups       | Must be migrated after fields, picklist values, and cascading picklists.                        | <a href="#">Chapter 7, "Migrating Picklist Value Groups"</a>        |
| Custom Web Link Fields      | Must be migrated before action bar layout and page layout.                                      | <a href="#">Chapter 9, "Migrating Custom Web Link Fields"</a>       |
| Concatenated Fields         | Must be migrated after fields, picklist values, cascading picklists, and picklist value groups. | <a href="#">Chapter 10, "Migrating Concatenated Fields"</a>         |
| Custom Web Applets          | Must be migrated before Homepage, action bar, and page layouts.                                 | <a href="#">Chapter 11, "Migrating Custom Web Applets"</a>          |
| Sales Assessment Templates  | Must be migrated before page layouts.   | <a href="#">Chapter 12, "Migrating Sales Assessment Templates"</a>  |
| Homepage Layouts            | Must be migrated before page layouts.   | <a href="#">Chapter 13, "Migrating Homepage Layouts"</a>            |
| Action Bar Layouts          | Must be migrated before page layouts.   | <a href="#">Chapter 14, "Migrating Action Bar Layouts"</a>          |
| Related Information Layouts | Must be migrated before page layouts.   | <a href="#">Chapter 15, "Migrating Related Information Layouts"</a> |
| Access Profiles             | Must be migrated before roles, and page layouts.  | <a href="#">Chapter 16, "Migrating Access Profiles"</a>             |
| Page Layouts                | Must be migrated before roles.  | <a href="#">Chapter 17, "Migrating Page Layouts"</a>                |

Table 4. A Recommended Sequence for Migrating Objects

| Object                               | Dependencies   | For More Information  |
|--------------------------------------|--|---|
| Dynamic Page Layouts                 | Must be migrated after page layouts and before role service.   | <a href="#">Chapter 18, "Migrating Dynamic Page Layouts"</a>                        |
| Search Layouts                       | Must be migrated after fields and before roles.  | <a href="#">Chapter 19, "Migrating Search Layouts"</a>                              |
| Roles                                | <p>Must be migrated after the following:</p> <ul style="list-style-type: none"> <li>■ Access profiles</li> <li>■ Page layouts</li> <li>■ Search layouts</li> </ul> <p>Must be migrated before the following:</p> <ul style="list-style-type: none"> <li>■ List access and order layouts</li> <li>■ Role associations for report folders</li> </ul> | <a href="#">Chapter 20, "Migrating Roles"</a>                                       |
| Workflow Rules                       | Must be migrated after fields and before action sets.  | <a href="#">Chapter 21, "Migrating Workflow Rules and Action Sets"</a>              |
| Workflow Rule Action Sets            | Must be migrated after workflow rules.   | <a href="#">Chapter 21, "Migrating Workflow Rules and Action Sets"</a>              |
| Assignment Rules                     | Must be migrated after assignment rule groups.   | <a href="#">Chapter 22, "Migrating Assignment Rule Groups and Assignment Rules"</a> |
| List Access and Order Layouts        | Must be migrated after roles.  | <a href="#">Chapter 23, "Migrating List Access and Order Layouts"</a>               |
| Role Associations for Report Folders | Must be migrated after roles.  | <a href="#">Chapter 24, "Migrating Role Associations for Report Folders"</a>        |
| Sales Categories                     | Must be migrated before process administration configuration data.   | <a href="#">Chapter 27, "Migrating Sales Categories"</a>                            |
| Process Administration               | Must be migrated after sales categories and custom fields.   | <a href="#">Chapter 29, "Migrating Process Administration Configuration Data"</a>   |

**NOTE:** Assignment rule groups, Custom HTML head tag additions, field audit setup, and modification tracking settings are independent of other objects and can be migrated at any point in the migration sequence. However, assignment rules cannot be migrated until the assignment rule groups have been migrated.

# Commands for Oracle Migration Tool On Demand

The commands, feature names, and specific configuration data accepted by the Oracle Migration Tool On Demand client are case sensitive. As an example, the following command extracts an access profile named Service Manager:

```
mi grationtool -u UserID -s ServerURL Read AccessProfile "Service Manager"
```

In this example, the following spellings are case sensitive:

- The Read command must be spelled as *Read* (uppercase *R*).
- The access profile feature must be spelled as *AccessProfile* (uppercase *A* and uppercase *P*).
- The access profile, which is called Service Manager in the user interface, must be spelled exactly as it appears in the user interface. In this example, the name of the access profile contains a space, so it must be enclosed within double quotation marks.

Table 5 displays the exact spelling and case of the commands supported by the Oracle Migration Tool On Demand client.

Table 5. Oracle Migration Tool On Demand Client Command Names

| Command Name   | Description   |
|----------------|---|
| ReadAll        | The ReadAll command exports all configuration data of a specific type from an Oracle CRM On Demand server.  |
| Read           | The Read command exports a single set of configuration data of a specific type from an Oracle CRM On Demand server.   |
| ReadForValue   | This command is used only for custom HTML head tag additions. It exports the custom HTML head tag additions for the Oracle CRM On Demand pages.   |
| Upsert         | The Upsert command updates or inserts configuration data of a specific type to an Oracle CRM On Demand server, as required. The configuration data is provided in an input XML file that is specified in the command.   |
| InsertOrUpdate | The InsertOrUpdate command updates workflow configuration data. The command updates a workflow configuration (that is, a workflow rule or a workflow action) if a matching configuration is found. If a matching workflow configuration does not exist, then the command inserts a new workflow configuration. The workflow configuration data is provided in an input XML file that is specified in the command.<br><b>NOTE:</b> This command is supported only for workflow rules and workflow actions. |
| Delete         | The Delete command deletes a single set of configuration data from an Oracle CRM On Demand server.<br><b>NOTE:</b> This command is supported only for custom Web tabs and workflow rules.   |

Table 5. Oracle Migration Tool On Demand Client Command Names

| Command Name | Description  |
|--------------|--|
| Create       | The Create command creates a new field or set of fields based on the contents of the input XML file that is specified in the command.<br><b>NOTE:</b> This command is supported only for custom fields (field management). |
| help         | The help command launches the user assistance provided with the Oracle Migration Tool On Demand client.  |

### Location of Output XML Files for Read and ReadAll Commands

By default, the output XML files that are created by the Read and ReadAll commands are stored in a folder that is named for the feature. The path for the folder is as follows:

*Installation directory\repository\Feature\*

**NOTE:** The repository folder is automatically created after you run the Oracle Migration Tool On Demand client the first time.

In the folder path:

- *Installation directory* is the directory where you installed the Oracle Migration Tool On Demand client on your computer, for example:

C:\Oracle Migration Tool On Demand

- *Feature* is a folder name that represents a feature for which the configuration data can be exported by the Oracle Migration Tool On Demand client. The folder for the feature is automatically created by the Oracle Migration Tool On Demand client the first time that you export a configuration for that feature. The folder name is one of the following:

- AccessProfile
- ActionBarLayout
- AssignmentRule
- AssignmentRuleGroup
- CascadingPicklist
- ConcatenatedField
- CustomHTMLHeadTag
- CustomRecordType
- Custom Web applets:
  - ❑ ActionBarCustomWebApplet
  - ❑ DetailPageCustomWebApplet
  - ❑ HomePageCustomWebApplet
  - ❑ HomeTabCustomWebApplet

- CustomWebLink
- CustomWebTab
- DynamicLayout
- EnableModificationTracking
- FieldAuditSetUp
- FieldManagement

**NOTE:** The FieldManagement folder holds the output that is generated when you extract the custom fields.

- HomepageLayout
- ListAccessAndOrder
- PageLayoutField
- PageLayoutRelatedInformation
- PageLayoutSection
- Picklist
- PickValueGroup
- ProcessAdministration
- RelatedInformationLayout
- ReportFolder
- Role
- SalesAssessmentTemplate
- SalesCategory
- SearchLayout
- WorkflowActionSet
- WorkflowRuleSet

For example, when you run the Read or ReadAll commands to extract access profiles, the Oracle Migration Tool On Demand client stores the XML files that it generates in the following folder:

C:\Oracle Migration Tool On Demand\Repository\AccessProfile



## Specifying Internet Proxy Server Information

Users who access the Internet using a proxy server can specify the proxy server information with the Oracle Migration Tool On Demand client. Table 6 contains the parameters used to specify proxy server information.

Table 6. Parameters Used to Specify an Internet Proxy Server

| Parameter                                      | Description  |
|--|--|
| <code>-proxyserver proxy_server: [port]</code> | Specifies the proxy server and the optional server port number to be used by the Oracle Migration Tool On Demand client. |
| <code>-proxyid proxy_server_userid</code>      | Specifies the proxy user ID to be used by the Oracle Migration Tool On Demand client.                                    |

### Examples of Using Parameters to Specify an Internet Proxy Server

The following is an example of specifying a proxy server where the user is prompted for the proxy password after entering the Oracle Migration Tool On Demand client command:

```
mi grati ontool -u UserID -s ServerURL -proxyserver MyProxyServer: [Port]
-proxyid ProxyUserID ReadAll AccessProfile
```

Where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *MyProxyServer: [Port]* is the URL for the Internet proxy server, and *[Port]* is the optional proxy server port. If the port is not specified, then port 80 is used by default.
- *ProxyUserID* is the user ID for the Internet proxy server.

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password and the password for the proxy server, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

If you are using a file to enter your passwords, then they must be on separate lines with the Oracle CRM On Demand password appearing first, followed by the proxy server password, as follows:

```
MyOnDemandPassword
MyProxyPassword
```

The following format is incorrect, where passwords are separated by a space on the same line:

```
MyOnDemandPassword MyProxyPassword
```

The following format is correct, but the order is incorrect:

MyProxyPassword  
MyOnDemandPassword

**NOTE:** The examples elsewhere in this guide that display how to use the Oracle Migration Tool On Demand client do not display the syntax to specify an Internet proxy server.

## XML Templates and Web Services Description Language

Certain Oracle CRM On Demand features have elements that might be required, might require a default value, or might be optional. Understanding how these elements are categorized helps you understand how to read and comprehend the information in an XML template. This topic helps you to determine which elements are required for migrating configuration data.

To understand the elements, you must download the Web Services Description Language (WSDL) for each feature that you want, and scan through each WSDL. After downloading the WSDL to your computer, view the content with an editor (for example, Notepad). As you scan the WSDL, take note of the elements with defined minOccurs and maxOccurs values. For more information about downloading WSDLs, see [“Downloading Administrative Web Services WSDLs from Oracle CRM On Demand” on page 35](#).

The minOccurs value and maxOccurs value are attributes of the <xsd:element> element in the XSD schema language. These attributes determine whether the element defined by <xsd:element> in a WSDL file is optional, and how many times the element can occur in an XML file. For example, the following entry in a WSDL file indicates that the <Name> element is required.

```
<xsd:element name="Name" maxOccurs="1" minOccurs="1" type="apData:string100" />
```

[Table 7](#) describes the values for minOccurs and maxOccurs.

Table 7. minOccurs and maxOccurs Values

| minOccurs | maxOccurs | Description  |
|-----------|-----------|--|
| 0         | 1         | The element is not required. If it is included, then a maximum of one entry can exist. |
| 0         | unbounded | The element is not required. If it is included, then it can exist multiple times.      |
| 1         | 1         | The element is required, but it exists only once.                                      |
| 1         | unbounded | The element is required, but it can exist multiple times.                              |

## About Web Services APIs

For information about the APIs provided by Oracle CRM On Demand Web Services and other administration Web services, see *Oracle Web Services On Demand Guide*, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network (OTN). This guide is also available from the Oracle CRM On Demand application by clicking Admin, Web Services Administration, and then Download Documentation.

**NOTE:** Oracle CRM On Demand Web Services provides additional functionality that is not available with the Oracle Migration Tool On Demand client, such as the migration of currency picklists and industry picklists. Also, for some features, Oracle CRM On Demand Web Services allows you to use the <IncludeAll> argument to extract the preconfigured data as well as the customized data, and to use the <CurrentUserOnly> argument to extract the configuration data for the current user only.

## Downloading Administrative Web Services WSDLs from Oracle CRM On Demand

To download an Administrative Web services WSDL from Oracle CRM On Demand, complete the steps in the following procedure.

**NOTE:** To download Administrative Web services WSDLs other than the Access Profiles WSDL, your user role must have the Customize Application privilege. To download the Access Profile WSDL or the Assessments Scripts WSDL, your user role must have the Manage Roles and Access privilege.

### *To download an Administrative Web services WSDL from Oracle CRM On Demand*

- 1 Sign in to Oracle CRM On Demand as a company administrator, and click Admin.
- 2 Under Web Services Integration, click Web Services Administration.
- 3 From the Select Service drop-down list, select Administrative Services.
- 4 From the WSDL Object list, select the required feature, for example, Homepage Layout.
- 5 Click Download.
- 6 Save the selected WSDL to a known location on your computer, for example:

C:\Migration Tool On Demand\WSDL

## Considerations for Using the Oracle CRM On Demand Migration Tool Client

The following topics describe some considerations when using the Oracle Migration Tool On Demand client for migrating Oracle CRM On Demand configuration data:

- [“Considerations for the Mark for Translation Setting” on page 36](#)
- [“Considerations for Character Encoding in Configuration Data” on page 36](#)

## Considerations for the Mark for Translation Setting

This topic describes the impact of the Mark for Translation setting (that is set in the Oracle CRM On Demand user interface) on the migration of configuration data using the Oracle Migration Tool On Demand client:

- If Mark for Translation is selected, then customized configuration data is extracted only in the default language (for example, ENU) in Read or ReadAll operations.
- If Mark for Translation is not selected, then customized configuration data is extracted in all languages that are set up for the company (for example, ENU, FRA, ITA, and so on) in Read or ReadAll operations.

Essentially, when the Mark for Translation feature is used, it overwrites all the other languages except for the default language for certain fields with *Name*, where *Name* is the value provided by the user. Any extracts by the Oracle Migration Tool On Demand client includes only the translation value of the default language and excludes all other languages that have been replaced with *Name*.

**NOTE:** The Mark for Translation check box is only available in the Default Language in the Oracle CRM On Demand user interface.

## Considerations for Character Encoding in Configuration Data

The Oracle Migration Tool On Demand client stores and transfers configuration data in XML. This allows you to manage change through version control tools such as diff. Therefore, all serializations must follow XML formatting and encoding rules.

The most commonly occurring characters that must be encoded are:

- Ampersand (&). Encoded as *&amp;*.
- Apostrophe ('). Encoded as *&apos;*.
- Double quotation mark ("). Encoded as *&quot;*.
- Left angle bracket (<). Encoded as *&lt;*.
- A right angle bracket (>). Encoded as *&gt;*.

To preserve the integrity of the XML content:

- The encoded ampersand (&#amp;) and left angle bracket (&#lt;) characters are necessary in XML content because they are used to avoid conflicts with XML entities and elements.
- The appropriate quote or apostrophe escaping is necessary when encoding attributes.

For example, if you extract data containing an ampersand character, then the Oracle Migration Tool On Demand client renders the ampersand to &#amp; in the XML file. If you run the Upsert operation on the data from the XML file, then any & characters must be represented as &#amp; in the XML for the upsert to be successful

To further illustrate, consider a Custom Web Tab in the UI with the following URL value containing ampersand characters:

```
https://xxxx.yyyy.com/commerce/buyside/  
commerce_manager.jsp?from_hp=true&_bm_trail_refresh=true&bm_cm_process_id=4482147  
&_partnerAccountId=%%%Account_Id%%%&_partnerSessionId=%%%User  
id%%%&_partnerSsoToken=%%%SSO Token%%%&_partnerSessionUrl=https%3A//secure-  
ausomxkwa.crmondemand.com/Services/Integration&BM_URL_CAPTURE_COOKIE=si ebel -dev
```

After a ReadAll operation, the same URL in the XML is remapped to the following URL value with the ampersand characters encoded as &amp; :

```
https://xxxx.yyyy.com/commerce/buyside/  
commerce_manager.jsp?from_hp=true&amp;_bm_trail_refresh=true&amp;bm_cm_process_id  
=4482147&amp;_partnerAccountId=%%%Account_Id%%%&amp;_partnerSessionId=%%%User  
id%%%&amp;_partnerSsoToken=%%%SSO Token%%%&amp;_partnerSessionUrl=https%3A//  
secure-ausomxkwa.crmondemand.com/Services/  
Integration&amp;BM_URL_CAPTURE_COOKIE=si ebel -dev
```



# 3

## Migrating Customized Record Types

This chapter describes how to migrate customized record types using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Customized Record Types on page 39](#)
- [Privileges Required for Migrating Customized Record Types on page 40](#)
- [Elements and Sections in the Customized Record Types XML Output File on page 40](#)
- [Migrating Customized Record Types on page 42](#)

### Customized Record Types

You can customize record types by changing the display name and associated icons. These changes are reflected in most areas of the user interface.

[Table 8](#) describes the Oracle Migration Tool On Demand client commands used with customized record types. For more information about running these commands, see [“Migrating Customized Record Types” on page 42](#).

Table 8. Oracle Migration Tool On Demand Commands for Customized Record Types

| Command   | Description  |
|---|--|
| Read CustomRecordType <i>SystemNameOfObject</i>           | This command exports the name and icon fields for a customized record type (object).<br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> . |
| ReadAll CustomRecordType                                  | This command exports all customized record types.  |
| Upsert CustomRecordType<br><i>CustomizedRecordTypeXML</i> | This command updates or inserts a set of fields in a particular object.  |

**NOTE:** Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

## Privileges Required for Migrating Customized Record Types

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll command: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Customized Record Types XML Output File

Table 9 describes the elements and sections in the XML output file for customized record types.

Table 9. Elements and Sections in the Customized Record Types XML File

| Element or Section  | Description  |
|---|--|
| <code>&lt;data: IncludeAll &gt;&lt;/data: IncludeAll &gt;</code>              | This element specifies whether all configuration information is returned for an object, in addition to the customized configuration information. If it is set to true, then all configuration information is returned. The default setting is false. |
| <code>&lt;data: Name&gt;Account&lt;/data: Name&gt;</code>                     | This element contains the system name of the object that is being referenced.  |
| <code>&lt;data: IconName&gt;1801.gif&lt;/data: IconName&gt;</code>            | This element contains the file name of the classic theme icon used by the referenced object. For the list of available icon file names, see <a href="#">"Classic and Modern Theme Icons" on page 387</a> .   |
| <code>&lt;data: AccessObj Name&gt;Account&lt;/data: AccessObj Name&gt;</code> | This element contains the access object name of the record type that is being referenced, for example, Account.<br><b>NOTE:</b> This element is read-only.   |



Table 9. Elements and Sections in the Customized Record Types XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: CustomizedPreviousOwnerChannel &gt;All Interactive Operations&lt;/data: CustomizedPreviousOwnerChannel &gt;</pre> | <p>This element indicates if the previous owner of a record is retained in the team. The values include:</p> <ul style="list-style-type: none"> <li>■ <b>Never Retain Owner.</b> The default value. The previous owner of the record will not be retained in the team.</li> <li>■ <b>Always Retain Owner.</b> The previous owner of the record will be retained in the team, except when the owner is changed using the assignment manager.</li> <li>■ <b>All Interactive Operations.</b> The previous owner of the record will be retained in the team, except when the owner is changed using the Import Assistant, the assignment manager, the mass update feature, or Web services.</li> </ul> |
| <pre>&lt;data: CustomizedPreviousOwnerAccessProfileId&gt;1QA2-HRM9N&lt;/data: CustomizedPreviousOwnerAccessProfileId&gt;</pre>   | <p>This element contains the ID of the access profile for the previous owner of a shared record.</p>   |
| <pre>&lt;data: CustomizedPreviousOwnerAccessProfile&gt;Full&lt;/data: CustomizedPreviousOwnerAccessProfile&gt;</pre>             | <p>This element contains the name of the specific access profile for the previous owner of a shared record.</p>  |

Table 9. Elements and Sections in the Customized Record Types XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: ListOfCustomRecordTypeTranslations&gt;   &lt;data: CustomRecordTypeTranslation&gt;     &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt;     &lt;data: SingularName&gt;Account&lt;/data: SingularName&gt;     &lt;data: PluralName&gt;Accounts&lt;/data: PluralName&gt;     &lt;data: ShortName&gt;Acct&lt;/data: ShortName&gt;   &lt;/data: CustomRecordTypeTranslation&gt; &lt;/data: ListOfCustomRecordTypeTranslations&gt;</pre> | <p>This section indicates the singular name, the plural name, and the short name that is displayed for the language code.</p> <p>In this example, for English-American (ENU), the singular name is <i>Account</i>, the plural name is <i>Accounts</i>, and the short name is <i>Acct</i>. For the list of language codes, see <a href="#">“Language Codes and Their Corresponding Language and Country” on page 279</a>.</p> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> <li><b>1</b> The translation definition, if it is defined.</li> <li><b>2</b> The information contained in the <code>&lt;DisplayName&gt;</code> element if it is defined and if the translation definition is not defined.</li> <li><b>3</b> The system name if the translation definition and the <code>&lt;DisplayName&gt;</code> element are not defined.</li> </ol> |

## Migrating Customized Record Types

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with customized record types:

- [“Extracting a Single Customized Record Type” on page 42](#)
- [“Extracting All Customized Record Types” on page 43](#)
- [“Updating or Inserting a Customized Record Type \(Upsert\)” on page 44](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Single Customized Record Type

This topic describes how to extract a single customized record type from your Oracle CRM On Demand server for your environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single customized record type:

```
mi grationtool -u UserID -s ServerURL Read CustomRecordType SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) that you want to extract, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Customized Record Type

The following is an example of extracting the customized record type for which the system name is Account:

```
mi grationtool -u UserID -s ServerURL Read CustomRecordType Account
```

**NOTE:** If the system name of the object contains spaces, then it must be enclosed with quotation marks.

## Extracting All Customized Record Types

This topic describes how to extract all customized record types from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all customized record types:

```
mi grationtool -u UserID -s ServerURL ReadAll CustomRecordType
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Customized Record Types

The following is an example of extracting all customized record types from your Oracle CRM On Demand server:

```
mi grationtool -u UserID -s ServerURL ReadAll CustomRecordType
```

### Updating or Inserting a Customized Record Type (Upsert)

This topic describes how to update a customized record type (if it exists) or insert a customized record type (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a customized record type (if it exists) or insert a customized record type (if it does not exist):

```
mi grationtool -u UserID -s ServerURL Upsert CustomRecordType CustomizedRecordTypeXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *CustomizedRecordTypeXML* is the fully qualified path name of the customized record type XML file, for example:

```
C:\My Files\MyAccount.xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting a Customized Record Type

The following is an example of updating an Account customized record type (if it exists) or inserting an Account customized record type (if it does not exist) in your Oracle CRM On Demand server:

```
mi grationtool -u UserID -s ServerURL Upsert CustomRecordType "C:\My Files\MyAccount.xml "
```

**NOTE:** Quotation marks are required only if the name contains spaces.

# 4

## Migrating Custom Web Tabs

This chapter describes how to migrate custom Web tabs using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Custom Web Tabs on page 45](#)
- [Privileges Required for Migrating Custom Web Tabs on page 46](#)
- [Elements and Sections in the Custom Web Tabs XML Output File on page 46](#)
- [Migrating Custom Web Tabs on page 47](#)

### Custom Web Tabs

Custom Web tabs allow you to display Web content in a tab within Oracle CRM On Demand.

[Table 10](#) describes the Oracle Migration Tool On Demand client commands used with custom Web tabs. For more information about running these commands, see [“Migrating Custom Web Tabs” on page 47](#).

Table 10. Commands Used with Custom Web Tabs in Oracle Migration Tool On Demand

| Command   | Description   |
|---|---|
| Read CustomWebTab <i>SystemNameOfCustomWebTab</i>   | This command exports a single custom Web tab.<br><br>The generated <i>SystemNameOfCustomWebTab</i> is derived from the custom Web tab name provided by a user.                                      |
| ReadAll CustomWebTab                                | This command exports all custom Web tabs.   |
| Upsert CustomWebTab <i>CustomWebTabXML</i>          | This command updates or inserts a custom Web tab, as required.  |
| Delete CustomWebTab <i>SystemNameOfCustomWebTab</i> | This command deletes a single custom Web tab from the Oracle CRM On Demand server.<br><br>The generated <i>SystemNameOfCustomWebTab</i> is derived from the custom Web tab name provided by a user. |

## Privileges Required for Migrating Custom Web Tabs

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll command: Enable Web Services Access, and Manage Roles and Access.
- For the Upsert command: Enable Web Services Access and Customize Application.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Custom Web Tabs XML Output File

Table 11 describes the elements and sections in the custom Web tabs XML output file.

Table 11. Elements and Sections in the Custom Web Tabs XML File

| Element or Section   | Description   |
|--|---|
| <code>&lt;data: DisplayName&gt;test&lt;/data: DisplayName&gt;</code>         | This element contains the system name of the custom Web tab that is being referenced.   |
| <code>&lt;data: Description&gt;&lt;/data: Description&gt;</code>             | This element contains the description for the custom Web tab.   |
| <code>&lt;data: Type&gt;&lt;/data: Type&gt;</code>                           | This element defines the content of the custom Web applet (either URL or HTML).   |
| <code>&lt;data: HTMLHeadAdditions&gt;&lt;/data: HTMLHeadAdditions&gt;</code> | This element specifies the HTML code that is included in the source of a rendered Oracle CRM On Demand Web page in the <code>&lt;head&gt;</code> tags at the top of the page. |
| <code>&lt;data: WebTabHTML&gt;&lt;/data: WebTabHTML&gt;</code>               | This element specifies the HTML code that is rendered in a custom Web tab.  |
| <code>&lt;data: Url &gt;&lt;/data: Url &gt;</code>                           | This element contains the URL information for the custom Web tab.   |
| <code>&lt;data: FrameHeight&gt;&lt;/data: FrameHeight&gt;</code>             | This element specifies the frame height of the custom Web tab.  |
| <code>&lt;data: FrameWidth&gt;&lt;/data: FrameWidth&gt;</code>               | This element specifies the frame width of the custom Web tab.   |

Table 11. Elements and Sections in the Custom Web Tabs XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: IconName&gt;icon_custtab.gif&lt;/data: IconName&gt;</pre>   | <p>This element contains the icon used for this custom Web tab. In this example, icon_custtab.gif is the graphic file that is used. For the list of available icon file names, see <a href="#">Appendix C, “Classic and Modern Theme Icons”</a>.</p>   |
| <pre>&lt;data: ListOfCustomWebTabTranslations&gt;   &lt;data: CustomWebTabTranslation&gt;     &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt;     &lt;data: DisplayName&gt;My Custom Web Tab&lt;/data: DisplayName&gt;   &lt;/data: CustomWebTabTranslation&gt; &lt;/data: ListOfCustomWebTabTranslations&gt;</pre> | <p>This section contains the display name for the language code. In this example, for English-American (ENU), the display name is <i>My Custom Web tab</i>.</p> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> <li><b>1</b> The translation definition, if it is defined.</li> <li><b>2</b> The information contained in the &lt;DisplayName&gt; element if it is defined and if the translation definition is not defined.</li> <li><b>3</b> The system name, if the translation definition and the &lt;DisplayName&gt; element are not defined.</li> </ol> |

## Migrating Custom Web Tabs

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate custom Web tabs:

- [“Extracting a Single Custom Web Tab” on page 47](#)
- [“Extracting All Custom Web Tabs” on page 48](#)
- [“Updating or Inserting a Custom Web Tab \(Upsert\)” on page 49](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Single Custom Web Tab

This topic describes how to extract a custom Web tab from your Oracle CRM On Demand server for your environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a custom Web tab:

```
mi gration tool -u UserID -s ServerURL Read CustomWebTab SystemNameOfCustomWebTab
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfCustomWebTab* is the system name of the Custom Web tab that you want to extract, for example, My Custom Web Tab.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Custom Web Tab

The following is an example of extracting a single custom Web tab:

```
mi gration tool -u UserID -s ServerURL Read CustomWebTab "My Custom Web Tab"
```

**NOTE:** Quotation marks are required only if the name of the custom Web tab contains spaces.

## Extracting All Custom Web Tabs

This topic describes how to extract all custom Web tabs from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all customized record types:

```
mi gration tool -u UserID -s ServerURL ReadAll CustomWebTab
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.



## Example of Extracting All Custom Web Tabs

The following is an example of extracting all custom Web tabs from your Oracle CRM On Demand server:

```
mi grationtool -u UserID -s ServerURL ReadAll CustomWebTab
```

## Updating or Inserting a Custom Web Tab (Upsert)

This topic describes how to update a custom Web tab (if it exists) or insert a custom web tab (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a custom Web tab (if it exists) or insert a custom web tab (if it does not exist):

```
mi grationtool -u UserID -s ServerURL Upsert CustomWebTab CustomWebTabXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *CustomWebTabXML* is the fully qualified path name of the custom Web tab XML file, for example:

```
C:\My Files\MyCustomWebTab.xml
```

## Example of Updating or Inserting a Custom Web Tab

The following is an example of updating a custom Web tab (if it exists) or inserting the custom Web tab (if it does not exist) in your Oracle CRM On Demand server:

```
mi grationtool -u UserID -s ServerURL Upsert CustomWebTab "C:\My Files\MyCustomWebTab.xml "
```

**NOTE:** Quotation marks are required only if the name contains spaces.

## Deleting a Single Custom Web Tab

This topic describes how to delete a custom Web tab from your Oracle CRM On Demand server for your environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to delete a custom Web tab:

```
mi grati ontool -u UserID -s ServerURL Delete CustomWebTab SystemNameOfCustomWebTab
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfCustomWebTab* is the system name of the custom Web tab that you want to delete, for example, My Custom Web Tab.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Deleting a Single Custom Web Tab

The following is an example of deleting a single custom Web tab:

```
mi grati ontool -u UserID -s ServerURL Delete CustomWebTab "My Custom Web Tab"
```

**NOTE:** Quotation marks are required only if the name of the custom Web tab contains spaces.

# 5

## Migrating Custom Fields

This chapter describes how to migrate custom fields using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Custom Fields on page 51](#)
- [Privileges Required for Migrating Custom Fields on page 52](#)
- [Elements and Sections in the Field Management XML Output File on page 52](#)
- [Migrating Custom Fields on page 57](#)

### Custom Fields

*Fields* refer to all items under the Field Management section in the Oracle CRM On Demand user interface. Each object has its own set of fields that are derived from the functionality of the objects.

[Table 12](#) describes the Oracle Migration Tool On Demand client commands used with fields. For more information about running these commands, see [“Migrating Custom Fields” on page 57](#).

Table 12. Commands Used with Fields in the Oracle Migration Tool On Demand Client

| Command  | Description   |
|--|---|
| Read FieldManagement <i>SystemNameOfObject</i>   | This command exports all customized and custom fields for a specific record type.<br><br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> . |
| ReadAll FieldManagement                          | This command exports all customized and custom fields for all objects.  |
| Upsert FieldManagement <i>FieldManagementXML</i> | This command updates or inserts a set of fields in a particular object, as required.  |
| Create FieldManagement <i>FieldManagementXML</i> | This command creates a new set of fields on a particular object from the contents of an XML file you create manually that contains the new field definitions, rather than extracting the definition from a company.   |

**NOTE:** If you are extracting field management from a source Oracle CRM On Demand environment, then regardless of whether the fields exist in the target Oracle CRM On Demand environment or not, use the Upsert command. If you are manually creating the field definitions and not extracting them from another source Oracle CRM On Demand environment, then use the Create command.

The Read and ReadAll commands extract only the field definitions for fields that have been created by a user or preconfigured fields that have been modified. Unmodified preconfigured fields are bypassed because they exist on all company tenants by default. An object with unmodified preconfigured fields or without any newly created fields contains an empty XML file.

The system names for the record types are listed in [“System Names for Record Types” on page 411](#). You might not have certain objects available depending on how your company is set up, so some of the system names that are listed might not exist for your company.

**NOTE:** Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands

## Privileges Required for Migrating Custom Fields

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert and Create commands: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Field Management XML Output File

Table 13 describes the elements and sections in the field management XML output file.

Table 13. Elements and Sections in the Field Management XML File

| Element or Section   | Description  |
|--|--|
| <code>&lt;data: IncludeAll&gt;true&lt;/data: IncludeAll&gt;</code>                   | This element specifies whether all configuration information is returned for an object, in addition to the customized configuration information. If it is set to true, then all configuration information is returned, including all child controls. The default is false.   |
| <code>&lt;data: DefaultAddressField&gt;true&lt;/data: DefaultAddressField&gt;</code> | When IncludeAll is set to 'True', the service fetches all controls for the object, including child controls. If the child control fetched is an address field and the address field is part of the default address template, then the <DefaultAddressField> element is set to true, otherwise it is set to false. This element can then be used as a marker to identify the best address field of the set. |
| <code>&lt;data: ObjectName&gt;Account&lt;/data: ObjectName&gt;</code>                | <ObjectName> contains the system name of the object that is being referenced. This name never changes.   |

Table 13. Elements and Sections in the Field Management XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: ListOfFields&gt; . . . &lt;/data: ListOfFields&gt;</pre>   | <p>This section contains all the customized field definitions for the object name.</p>  |
| <pre>&lt;data: Field&gt; . . . &lt;/data: Field&gt;</pre>   | <p>This section contains all the elements for a single field.</p>   |
| <pre>&lt;data: Field&gt;   &lt;data: Name&gt;TEXTSM_001   &lt;/data: Name&gt; . . . &lt;/data: Field&gt;</pre>  | <p>&lt;Name&gt; contains the system name of the field, which never changes.</p>   |
| <pre>&lt;data: Field&gt;   &lt;data: DisplayName&gt;My Custom Field   &lt;/data: DisplayName&gt; . . . &lt;/data: Field&gt;</pre>                     | <p>&lt;DisplayName&gt; contains the name in the user interface to use if no Translation Display Names are provided.</p>   |
| <pre>&lt;data: Field&gt;   &lt;data: FieldType&gt;Text (Short)   &lt;/data: FieldType&gt; . . . &lt;/data: Field&gt;</pre>                            | <p>&lt;FieldType&gt; specifies the type of field.</p>   |
| <pre>&lt;data: Field&gt;   &lt;data: IntegrationTag&gt;   stMy_Custom_Field   &lt;/data: IntegrationTag&gt; . . . &lt;/data: Field&gt;</pre>          | <p>&lt;IntegrationTag&gt; contains the custom integration tag name of the field. This tag can be modified by Oracle CRM On Demand users.</p> <p>The default Integration Tag is of the format:</p> <p style="text-align: center;"><i>fieldtypeDisplay_Name</i></p> <p>For example, stMy_Custom_Field is assigned to a custom field of type Text (Short) with the Display Name value of: My Custom Field.</p> |
| <pre>&lt;data: Field&gt;   &lt;data: GenericIntegrationTag&gt;   CustomText32   &lt;/data: GenericIntegrationTag&gt; . . . &lt;/data: Field&gt;</pre> | <p>&lt;GenericIntegrationTag&gt; contains the default integration tag assigned to the field by Oracle CRM On Demand. This element cannot be modified by Oracle CRM On Demand users.</p> <p><b>NOTE:</b> For non-custom fields, the &lt;GenericIntegrationTag&gt; and the &lt;IntegrationTag&gt; values are the same.</p>  |
| <pre>&lt;data: Field&gt;   &lt;data: Required&gt;false   &lt;/data: Required&gt; . . . &lt;/data: Field&gt;</pre>                                     | <p>&lt;Required&gt; specifies whether the field is a required field (true), or if it is not a required field (false).</p> <p>If a condition is specified in the &lt;RequiredCondition&gt; element, then the &lt;Required&gt; element must be set to false.</p>  |

Table 13. Elements and Sections in the Field Management XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: Field&gt;   &lt;data: RequiredCondition&gt;[Type] =LookupValue("ACCOUNT_TYPE", "Customer")   &lt;/data: RequiredCondition&gt; &lt;/data: Field&gt;</pre> | <p>&lt;RequiredCondition&gt; can contain an expression that specifies the criteria that make the field required. If an expression is specified, then the field becomes required when the condition specified in the expression is met. In the example shown here, the field becomes required when the Customer value is selected in the Account Type field.</p> <p>If the &lt;Required&gt; element is set to true, then the &lt;RequiredCondition&gt; element must not contain a value.</p> |
| <pre>&lt;data: Field&gt;   &lt;data: Optimized&gt;false   &lt;/data: Optimized&gt; &lt;/data: Field&gt;</pre>   | <p>&lt;Optimized&gt; specifies whether this is an optimized field (true) or is not an optimized field (false). Optimized fields are supported for certain record types only. For more information about optimized fields, see <i>Oracle CRM On Demand Online Help</i>.</p>  |
| <pre>&lt;data: Field&gt;   &lt;data: ReadOnly&gt;false   &lt;/data: ReadOnly&gt; &lt;/data: Field&gt;</pre>   | <p>&lt;ReadOnly&gt; determines if the field is a read-only field (true) or if it is not a read-only field (false).</p>  |
| <pre>&lt;data: Field&gt;   &lt;data: DefaultValue&gt;   &lt;/data: DefaultValue&gt; &lt;/data: Field&gt;</pre>  | <p>&lt;DefaultValue&gt; contains the default value of the field, if one is defined.</p>   |
| <pre>&lt;data: Field&gt;   &lt;data: FieldValidation&gt;   &lt;/data: FieldValidation&gt; &lt;/data: Field&gt;</pre>  | <p>&lt;FieldValidation&gt; contains the validation rules for the custom field, if any are defined.</p>  |
| <pre>&lt;data: Field&gt;   &lt;data: PostDefault&gt;false   &lt;/data: PostDefault&gt; &lt;/data: Field&gt;</pre>   | <p>&lt;PostDefault&gt; specifies whether the field is prepopulated with the default value when a new record is being created. If the &lt;PostDefault&gt; element is set to true, then the field is not prepopulated with the default value when the record is created, but if a value is not provided for the field before the record is saved, then the default value is assigned to the field when the record is saved.</p>   |

Table 13. Elements and Sections in the Field Management XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: Field&gt;   &lt;data: DenormalizedControl&gt;false &lt;/data: DenormalizedControl&gt; &lt;/data: Field&gt;</pre> | <p>&lt;DenormalizedControl&gt; corresponds to the Related Information check box in field management. For Custom Object record types, you can create custom related information fields. For these record types, the following fields are available on the Field Edit page in the UI: Related Information, Related Record Type, and Related Field. These fields are used only for creating custom related information fields. Most of the other fields on the Field Edit page become read-only fields after you select the Related Information check box. For more information about custom related information fields, see <i>Oracle CRM On Demand Online Help</i>.</p> |
| <pre>&lt;data: Field&gt;   &lt;data: DenormalizedAssociateControlName/&gt; &lt;/data: Field&gt;</pre>                           | <p>&lt;DenormalizedAssociateControlName&gt; corresponds to the Related Record Type picklist in field management.</p>   |
| <pre>&lt;data: Field&gt;   &lt;data: DenormalizedControlName/&gt; &lt;/data: Field&gt;</pre>                                    | <p>&lt;DenormalizedControlName&gt; corresponds to the Related Field picklist in field management.</p>  |
| <pre>&lt;data: Field&gt;   &lt;data: ValidationErrorMsg&gt;   &lt;/data: ValidationErrorMsg&gt; &lt;/data: Field&gt;</pre>      | <p>&lt;ValidationErrorMsg&gt; contains the error message that is displayed when a validation rule fails, if a message is defined.</p>  |
| <pre>&lt;data: Field&gt;   &lt;data: TooltipText&gt;   &lt;/data: TooltipText&gt; &lt;/data: Field&gt;</pre>                    | <p>&lt;TooltipText&gt; contains the tooltip text that is displayed for the field in the Oracle CRM On Demand UI, if tooltip text is defined.</p>   |
| <pre>&lt;data: Field&gt;   &lt;data: Description&gt;   &lt;/data: Description&gt; &lt;/data: Field&gt;</pre>                    | <p>&lt;Description&gt; contains the description of the field.</p>  |
| <pre>&lt;data: Field&gt;   &lt;data: TooltipFormat&gt;HTML   &lt;/data: TooltipFormat&gt; &lt;/data: Field&gt;</pre>            | <p>&lt;TooltipFormat&gt; specifies the format of the tooltip text, which can be HTML or Plain Text.</p>  |

Table 13. Elements and Sections in the Field Management XML File

| Element or Section   | Description   |
|--|---|
| <pre> &lt;data: Field&gt;   &lt;data: ListOfFieldTranslations&gt;     &lt;data: FieldTranslation&gt;       &lt;data: LanguageCode&gt;ENU       &lt;/data: LanguageCode&gt;       &lt;data: DisplayName&gt;Roles       &lt;/data: DisplayName&gt;       &lt;data: ValidationErrorMessage&gt;       &lt;/data: ValidationErrorMessage&gt;       &lt;data: ToolTipText&gt;       &lt;/data: ToolTipText&gt;       &lt;data: Description&gt;       &lt;/data: Description&gt;     &lt;/data: FieldTranslation&gt;   &lt;/data: ListOfFieldTranslations&gt; &lt;/data: Field&gt; </pre> | <p>The &lt;ListOfFieldTranslations&gt; section contains the Display Name, Validation Error Message, ToolTip Text, and Description that are displayed for the language code. In this example, for English-American (ENU), the display name is <i>Roles</i>, and the Validation Error Message is not set. For the list of language codes, see <a href="#">“Language Codes and Their Corresponding Language and Country” on page 279</a>.</p> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> <li><b>1</b> The translation definition if it is defined.</li> <li><b>2</b> The information contained in the &lt;DisplayName&gt; element if it is defined, and if the translation definition is not defined.</li> <li><b>3</b> The system name, if the translation definition and the &lt;DisplayName&gt; element are not defined.</li> </ol> |

For more information about field management, see *Oracle CRM On Demand Online Help*.

## Example of a Field Management XML File Containing a Web Link Field Type

This example displays a section of a Field Management XML containing a field of type Web Link.

The Field Management service includes Custom Web Links. When you run a Read or ReadAll command, the resulting XML file will include any customized fields of type Web Link. The Upsert also supports XML files that contain Web Link information.

```

<data: Field>
  <data: Name>WEBLINK_002</data: Name>
  <data: DisplayName>My Custom Web Link
  </data: DisplayName>
  <data: FieldType>Web Link</data: FieldType>
  <data: IntegrationTag>My_Custom_Web_Link
  </data: IntegrationTag>
  <data: Required>false</data: Required>
  <data: ReadOnly>true</data: ReadOnly>
  <data: DefaultVal ue></data: DefaultVal ue>
  <data: ListOfFieldTranslations>
    <data: FieldTranslation>
      <data: LanguageCode>ENU</data: LanguageCode>
      <data: DisplayName>My Custom Link
      </data: DisplayName>
    </data: FieldTranslation>
  </data: ListOfFieldTranslations>
</data: Field>

```

For more information about custom Web links, see [Chapter 9, “Migrating Custom Web Link Fields.”](#)



# Migrating Custom Fields

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate field definitions:

- [“Extracting Customized Field Definitions for a Single Object” on page 57](#)
- [“Extracting Customized Field Definitions for All Objects” on page 58](#)
- [“Updating or Inserting a Set of Field Definitions \(Upsert\)” on page 58](#)
- [“Creating a New Field Definition” on page 59](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting Customized Field Definitions for a Single Object

This topic describes how to extract the set of customized field definitions for a single object from your Oracle CRM On Demand server for your environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract field definitions for a single object:

```
mi grati ontool -u UserID -s ServerURL Read Fi el dManagement SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) whose field definitions you want to extract, for example, Account Contact. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Customized Field Definitions for a Single Object

The following is an example of extracting the customized field definitions for the Account Contact object:

```
mi grati ontool -u UserID -s ServerURL Read Fi el dManagement "Account Contact"
```

**NOTE:** Quotation marks are required only if the name contains spaces.

## Extracting Customized Field Definitions for All Objects

This topic describes how to extract all customized field definitions for all objects from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all customized field definitions:

```
mi grati ontool -u UserID -s ServerURL ReadAll FieldManagement
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting Customized Field Definitions for All Objects

The following is an example of extracting all customized field definitions for all objects from your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAll FieldManagement
```

## Updating or Inserting a Set of Field Definitions (Upsert)

This topic describes how to update a specific set of field definitions (if they exist) or insert those field definitions (if they do not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific set of field definitions (if they exist), or insert those field definitions (if they do not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert FieldManagement FieldManagementXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *FieldManagementXML* is the fully qualified path name of the field management XML file, for example:

C:\My Files\AccountContact.xml

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a Set of Field Definitions

The following is an example of updating account contact field definitions (if they exist) or inserting the field definitions (if they do not exist) in your Oracle CRM On Demand server

```
migratontool -u UserID -s ServerURL Upsert FieldManagement "C:\My
Files\AccountContact.xml "
```

**NOTE:** Quotation marks are required only if the file name contains spaces.

## Creating a New Field Definition

This topic describes how to create a new field definition for your Oracle CRM On Demand environment. (Typically, the Create operation is used to manually create brand new XML content rather than extracting the definition from a company.)

**NOTE:** System names (that is, the value between the <Name> tag) cannot be defined by a user, and it is a required field. A system name is a required field for an Upsert command. Any Field Management XML file extracted from a company tenant always has the system name defined. A net new field is a field that has not been extracted from another tenant but is defined in an XML file. To create a net new field, you must use the Create function. The Create function allows you to insert field definitions without having the system name defined.

The following is an example XML for using the Create method when you want to explicitly create a new field on the target:

```
<data: CustomField xmlns:data="urn:/crmondemand/xml/fieldmanagement/data">
  <data: ObjectName>Account</data: ObjectName>
  <data: DisplayName>My Customized Field</data: DisplayName>
  <data: CustomFieldType>Text (Long)</data: CustomFieldType>
  <data: IntegrationTag>My_Customized_Field</data: IntegrationTag>
  <data: Required>false</data: Required>
  <data: ReadOnly>false</data: ReadOnly>
  <data: DefaultValue/>
  <data: ListOfCustomFieldTranslations>
    <data: CustomFieldTranslation>
      <data: LanguageCode>ENU</data: LanguageCode>
      <data: DisplayName>My Customized Field</data: DisplayName>
    </data: CustomFieldTranslation>
  </data: ListOfCustomFieldTranslations>
</data: CustomField>
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to create a new field definition:

```
mi grati ontool -u UserID -s ServerURL Create Fi el dManagement Fi el dManagementXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *FieldManagementXML* is the fully qualified path name of the field management XML file, for example:

```
C:\My Fi les\MyAccountFi el d. xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Creating a New Field Definition

The following is an example of creating a field definition for the Account object:

```
mi grati ontool -u UserID -s ServerURL Create Fi el dManagement "C:\My  
Fi les\MyAccountFi el d. xml "
```

**NOTE:** Quotation marks are required only if the name contains spaces.

# 6

## Migrating Picklist Values

This chapter describes how to migrate picklist values using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Picklist Values on page 61](#)
- [Privileges Required for Migrating Picklist Values on page 61](#)
- [Elements and Sections in the Picklist XML Output File on page 62](#)
- [Migrating Picklist Values on page 63](#)

### Picklist Values

Picklist values are those values that you have assigned to a field of the type Picklist in the Oracle CRM On Demand application.

[Table 14](#) describes the Oracle Migration Tool On Demand client commands used with picklist values. For more information about running these commands, see [“Migrating Picklist Values” on page 63](#).

Table 14. Oracle Migration Tool On Demand Commands for Picklist Values

| Command                                 | Description  |
|---|--|
| Read Picklist <i>SystemNameOfObject</i> | This command exports a set of picklist values for a specific record type (object).<br><br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> . |
| ReadAll Picklist                        | This command exports all picklist values separated by the object name.   |
| Upsert Picklist <i>PicklistXML</i>      | This command updates or inserts a set of picklist values in a particular object.   |

**NOTE:** Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

### Privileges Required for Migrating Picklist Values

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

Field management must be supported by the object.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Picklist XML Output File

Table 15 describes the elements and sections in the picklist XML output file.

Table 15. Elements and Sections in the Picklist XML File

| Element or Section   | Description  |
|--|--|
| <code>&lt;data: IncludeAll&gt;true&lt;/data: IncludeAll&gt;</code>   | This element specifies whether all configuration information is returned for an object, in addition to the customized configuration information. If it is set to true, then all configuration information is returned. The default setting is false.   |
| <code>&lt;data: ObjectName&gt;&lt;/data: ObjectName&gt;</code>   | This element contains the object that is being referenced.   |
| <code>&lt;data: ListOfPicklists&gt;&lt;/data: ListOfPicklists&gt;</code>   | This element contains all the customized field definitions for the object name.  |
| <code>&lt;data: Name&gt;Team Role&lt;/data: Name&gt;</code>  | The name of the Picklist field within the object being referenced.   |
| <code>&lt;data: WebSvcTag&gt;Team Role&lt;/data: WebSvcTag&gt;</code>  | This element contains the Web Services v2.0 integration tag name for the field. This element is read-only and is ignored in Upsert operations.   |
| <pre> &lt;data: ListOfPicklistValues&gt;   &lt;data: PicklistValue&gt;     &lt;data: ValueId&gt;Executive Sponsor     &lt;/data: ValueId&gt;     &lt;data: Disabled&gt;&gt;false&lt;/data: Disabled&gt;     &lt;data: ListOfValueTranslations&gt;       &lt;data: ValueTranslation&gt;         &lt;data: LanguageCode&gt;ENU         &lt;/data: LanguageCode&gt;         &lt;data: Value&gt;Executive Sponsor         &lt;/data: Value&gt;         &lt;data: Order&gt;2&lt;/data: Order&gt;       &lt;/data: ValueTranslation&gt;     &lt;/data: ListOfValueTranslations&gt;   &lt;/data: PicklistValue&gt; </pre> | <p>This section contains the values assigned to a picklist field:</p> <ul style="list-style-type: none"> <li>■ <code>&lt;ValueId&gt;</code> is the ValueId assigned to the specific picklist value.</li> <li>■ <code>&lt;Disabled&gt;</code> identifies whether the value is disabled or not.</li> <li>■ <code>&lt;ValueTranslation&gt;</code> is the section containing the language code, the value for the given language, and the order for the specific ValueID.</li> </ul> |

# Migrating Picklist Values

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate picklist values:

- [“Extracting All Picklist Values for a Single Object” on page 63](#)
- [“Extracting a Single Picklist Field” on page 64](#)
- [“Extracting All Picklist Values for All Objects” on page 64](#)
- [“Updating or Inserting a Set of Picklist Values for a Single Object \(Upsert\)” on page 65](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting All Picklist Values for a Single Object

This topic describes how to extract all picklist values for a single object from your Oracle CRM On Demand server for your environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all picklist values for an object:

```
mi grati ontool -u UserID -s ServerURL Read Pickl i st SystemNameOfObj ect
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObj ect* is the system name of the object (record type) for which you want to extract the picklists, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Picklist Values for a Single Object

The following is an example of extracting all picklist values for the Account object:

```
mi grati ontool -u UserID -s ServerURL Read Pickl i st Account
```

**NOTE:** Quotation marks are required only if the object name contains spaces.

## Extracting a Single Picklist Field

To extract a single picklist field for an object, complete the steps in the following procedure.

### *To extract a single picklist field*

- 1 Prepare an input XML file as follows:

```
<data: PicklistSet xmlns:data="urn:/crmondemand/xml/picklist/query">
  <data:ObjectName>ObjectName</data:ObjectName>
  <data:ListOfPicklists>
    <data:Picklist>
      <data:Name>PickListName</data:Name>
    </data:Picklist>
  </data:ListOfPicklists>
</data:PicklistSet>
```

where:

- *ObjectName* is the name of the object, for example, Account.
- *PickListName* is the name of the picklist that you want to extract.

- 2 Run the Oracle Migration Tool On Demand client as follows:

```
migratontool -u UserID -s ServerURL Read Picklist InputXMLFilePath
```

For example, if your input XML file is named MyAccountPicklist.xml:

```
migratontool -u UserID -s ServerURL Read Picklist "C:\MyFiles\MyAccountPicklist.xml"
```

## Extracting All Picklist Values for All Objects

This topic describes how to extract all picklist values from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all picklist values for all objects:

```
migratontool -u UserID -s ServerURL ReadAll Picklist
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.



## Example of Extracting All Picklist Values for All Objects

The following is an example of extracting all picklist values from your Oracle CRM On Demand server for all objects:

```
mi gration tool -u UserID -s ServerURL ReadAll Picklist
```

## Updating or Inserting a Set of Picklist Values for a Single Object (Upsert)

This topic describes how to update a set of picklist values (if the set exists) or insert a set of picklist values (if the set does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a set of picklist values (if the set exists) or insert a set of picklist values (if the set does not exist):

```
mi gration tool -u UserID -s ServerURL Upsert Picklist PicklistXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *PicklistXML* is the fully qualified path name of the picklist XML file, for example:

```
C: \My Files\MyAccountPicklist.xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a Set of Picklist Values for a Single Object

The following is an example of updating a set of custom picklist values for the Account object (if the set exists) or inserting a set of custom picklist values (if the set does not exist) in your Oracle CRM On Demand server:

```
mi gration tool -u UserID -s ServerURL Upsert Picklist "C: \My Files\MyAccountPicklist.xml"
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.



# 7

## Migrating Picklist Value Groups

This chapter describes how to migrate picklist value groups using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Picklist Value Groups on page 67](#)
- [Privileges Required for Migrating Picklist Value Groups on page 68](#)
- [Elements and Sections in the Picklist Value Groups XML Output File on page 68](#)
- [Migrating Picklist Value Groups on page 69](#)

### Picklist Value Groups

You can use a picklist value group to limit values that users can select in a picklist. A picklist value can be mapped to one or more picklist value groups. However, if there are no values mapped to a picklist value group, then the picklist displays all values. For more information about picklist value groups see, *Oracle CRM On Demand Online Help*.

For example, if an Account record has a defined picklist value group, then only the picklist values mapped to the defined picklist value group are displayed in the respective picklist fields. The following is a typical picklist value group structure:

```
<PVG1>
  <Account/Account Type>
    <Account Type Value1>
    <Account Type Value2>
  <Service Request/Status>
    <SR status value1>
    <SR status value14>
<PVG2>
  <Account/Account Type>
    <Account Type Value2>
    <Account Type Value3>
  <Account/Account Status>
    <Account Status Value1>
    <Account Status Value3>
```

Table 16 describes the Oracle Migration Tool On Demand client commands used with picklist value groups. For more information about running these commands, see “Migrating Picklist Value Groups” on page 69.

Table 16. Oracle Migration Tool On Demand Commands for Picklist Value Groups

| Command  | Description   |
|--|---|
| Read PickValueGroup <i>PickValueGroupName</i>  | This command exports the picklist value group details for the specified picklist value group. |
| ReadAll PickValueGroup                         | This command exports all picklist value groups in the Oracle CRM On Demand tenant.            |
| Upsert PickValueGroup <i>PickValueGroupXML</i> | This command updates or inserts a picklist value group.                                       |

**NOTE:** Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll command.

## Privileges Required for Migrating Picklist Value Groups

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For Read and ReadAll commands: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access and Customize Application.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Picklist Value Groups XML Output File

Table 17 describes the elements and sections in the picklist value group XML output file.

Table 17. Elements and Sections in the Picklist Value Group XML File

| Element or Section  | Description   |
|---|---|
| <data: PicklistValueGroupName>PVG Name</data: PicklistValueGroupName> | This case-sensitive element contains the system name of the picklist value group. |
| <data: Description>PVG description</data: Description>                | This element contains the description for the picklist value group.               |

Table 17. Elements and Sections in the Picklist Value Group XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: PickValueGroupID&gt;10A2-NX0XH&lt;/data: PickValueGroupID&gt;</pre>  | <p>This element contains the row ID to uniquely identify the picklist value group.</p>  |
| <pre>&lt;data: ListOfPicklistTypeSet&gt;   &lt;data: PicklistTypeSet&gt;     &lt;data: ObjectName&gt;Account&lt;/data: ObjectName&gt;     &lt;data: FieldName&gt;Account Type Value 1     &lt;/data: FieldName&gt;     &lt;data: ListOfLicNameSet&gt;       &lt;data: LicNameSet&gt;         &lt;data: LicName&gt;Account Type Value 2         &lt;/data: LicName&gt;       &lt;/data: LicNameSet&gt;     &lt;/data: ListOfLicNameSet&gt;   &lt;/data: PicklistTypeSet&gt; &lt;/data: ListOfPicklistTypeSet&gt;</pre> | <p>This section contains the Picklist fields mapped to a picklist value group.</p> <ul style="list-style-type: none"> <li>■ &lt;ObjectName&gt; contains the system name of the object.</li> <li>■ &lt;FieldName&gt; contains the system name of the picklist field.</li> <li>■ &lt;ListOfLicNameSet&gt; contains the language independent picklist values mapped to the picklist value group.</li> <li>■ &lt;LicName&gt; contains a language independent picklist value.</li> </ul> |

## Migrating Picklist Value Groups

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate picklist value groups:

- [“Extracting a Single Picklist Value Group” on page 69](#)
- [“Extracting All Picklist Value Groups” on page 70](#)
- [“Updating or Inserting a Picklist Value Group” on page 70](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Single Picklist Value Group

This topic describes how to extract the data for one picklist value group from your Oracle CRM On Demand environment (customer test environment or production environment).

#### Syntax

```
mi grati ontool -u UserID -s ServerURL Read PickValueGroup PickValueGroupName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *PickValueGroupName* is the name of the picklist value group that you want to extract.

## Extracting All Picklist Value Groups

This topic describes how to extract all picklist value group data from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all picklist value groups for all objects:

```
mi grati ontool -u UserID -s ServerURL ReadAl l Pi ckVal ueGroup
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

## Updating or Inserting a Picklist Value Group

This topic describes how to update a set of picklist value group values (if the set exists) or insert a set of picklist value group values (if the set does not exist) in your Oracle CRM On Demand environment (customer test environment or production environment).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a set of picklist value group values (if the set exists) or insert a set of picklist value group values (if the set does not exist).

```
mi grati ontool -u UserID -s ServerURL Upsert Pi ckVal ueGroup Pi ckVal ueGroupXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *PickValueGroupXML* is the fully qualified path name of the picklist value group XML file, for example:

```
C:\My Fi l es\MyAccountPi ck l i stVal ueGroup. xml
```

# 8

## Migrating Cascading Picklists

This chapter describes how to migrate cascading picklists using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Cascading Picklists on page 71](#)
- [Privileges Required for Migrating Cascading Picklists on page 71](#)
- [Elements and Sections in the Cascading Picklist XML Output File on page 72](#)
- [Migrating Cascading Picklists on page 73](#)

### Cascading Picklists

Cascading picklists restrict the values of a picklist, which is the related picklist. The cascading picklist is derived from the value selected in another picklist, which is the parent picklist.

[Table 18](#) describes the Oracle Migration Tool On Demand client commands used with cascading picklists. For more information about running these commands, see [“Migrating Cascading Picklists” on page 73](#).

Table 18. Oracle Migration Tool On Demand Commands for Cascading Picklists

| Command   | Description  |
|---|--|
| <code>Read CascadingPicklist <i>SystemNameOfObject</i></code>         | This command exports the values for all cascading picklists for a specific record type (object).<br><br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> . |
| <code>ReadAll CascadingPicklist</code>                                | This command exports all cascading picklists for all of the objects set up for the user running the Oracle Migration Tool On Demand client.  |
| <code>Upsert CascadingPicklist<br/><i>CascadingPicklistXML</i></code> | This command updates or inserts a cascading picklist, as required.   |

### Privileges Required for Migrating Cascading Picklists

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

Cascading picklists must be supported by the object.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Cascading Picklist XML Output File

Table 19 describes the elements and sections in the cascading picklist XML output file.

Table 19. Elements and Sections in the Cascading Picklist XML File

| Element or Section  | Description  |
|---|--|
| <code>&lt;data:ObjectName&gt;&lt;/data:ObjectName&gt;</code>  | This element contains the object that is being referenced.   |
| <code>&lt;data:ListOfCascadingPicklist&gt;<br/>&lt;/data:ListOfCascadingPicklist&gt;</code>   | This element contains all the cascading picklist definitions for the object name.  |
| <code>&lt;data: CascadingPicklist&gt;<br/>  &lt;data: ParentPicklist&gt;Organization<br/>  Relationship&lt;/data: ParentPicklist&gt;<br/>  &lt;data: RelatedPicklist&gt;Region<br/>  &lt;/data: RelatedPicklist&gt;<br/>  &lt;data: Description&gt;&lt;/data: Description&gt;<br/>  &lt;data: ListOfPicklistValueAssociations&gt;<br/>    &lt;data: PicklistValueAssociations&gt;<br/>      &lt;data: ParentPicklistValue&gt;IHN<br/>      &lt;/data: ParentPicklistValue&gt;<br/>      &lt;data: RelatedPicklistValue&gt;East<br/>      &lt;/data: RelatedPicklistValue&gt;<br/>      &lt;data: RelatedPicklistValue&gt;West<br/>      &lt;/data: RelatedPicklistValue&gt;<br/>    &lt;/data: PicklistValueAssociations&gt;<br/>  &lt;/data: ListOfPicklistValueAssociations&gt;<br/>&lt;/data: CascadingPicklist&gt;</code> | <p><code>&lt;CascadingPicklist&gt;</code> contains all the values for a cascading picklist, as follows:</p> <ul style="list-style-type: none"> <li>■ <code>&lt;ParentPicklist&gt;</code> contains the parent picklist that has been defined.</li> <li>■ <code>&lt;RelatedPicklist&gt;</code> contains the related picklist that has been defined.</li> <li>■ <code>&lt;Description&gt;</code> contains the description that has been defined.</li> <li>■ <code>&lt;ListOfPicklistValueAssociations&gt;</code> contains all the associations for the given cascading picklist.</li> <li>■ <code>&lt;PicklistValueAssociations&gt;</code> contains the starting section for a single association for the given cascading picklist.</li> <li>■ <code>&lt;ParentPicklistValue&gt;</code> contains the parent picklist value for the given cascading picklist.</li> <li>■ <code>&lt;RelatedPicklistValue&gt;</code> contains the related values for the parent picklist that has been defined.</li> </ul> |



## Migrating Cascading Picklists

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to export cascading picklists:

- [“Extracting Cascading Picklists for a Single Object” on page 73](#)
- [“Extracting Cascading Picklists for All Objects” on page 74](#)
- [“Updating or Inserting a Cascading Picklist \(Upsert\)” on page 74](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting Cascading Picklists for a Single Object

This topic describes how to extract the cascading picklists for a single object from your Oracle CRM On Demand server for your environment (customer test environment or production).

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the cascading picklists for an object:

```
mi grati ontool -u UserID -s ServerURL Read Cascadi ngPi ckl i st SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you are extracting the cascading picklists, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Cascading Picklists for a Single Object

The following is an example of extracting the cascading picklists for the Account object:

```
mi grati ontool -u UserID -s ServerURL Read Cascadi ngPi ckl i st Account
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting Cascading Picklists for All Objects

This topic describes how to extract all the cascading picklists from your Oracle CRM On Demand environment (customer test environment or production) for all objects set up for the user who is running the command.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all cascading picklists for all objects set up for the user running the command:

```
mi grati ontool -u UserID -s ServerURL ReadAll CascadingPicklist
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Cascading Picklists for All Objects

The following is an example of extracting all cascading picklists for all objects that you have set up on your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAll CascadingPicklist
```

## Updating or Inserting a Cascading Picklist (Upsert)

This topic describes how to update a specific cascading picklist (if it exists), or insert that cascading picklist (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production). For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*. This operation is specified using the Upsert command.

An update to a cascading picklist is derived from the cascading picklist system name. That is, if you run an Upsert operation on a cascading picklist where the cascading picklist system name in the XML file is *My CascadePickList*, and a cascading picklist of the same name exists in the target company, then the target cascading picklist is updated. If the cascading picklist does not exist on the target company, then the cascading picklist is inserted on the target. The matching of the cascading picklist name is also case sensitive. For example, if the cascading picklist system name in the XML file is *MY CascadePickList* and the target access profile is *My CascadePickList* (no uppercase *Y*), then the *MY CascadePickList* cascading picklist is inserted in the target.

An Upsert operation on a cascading picklist fails if the following conditions occur:

- The parent picklist is the same as a related picklist because looping cascades are not allowed.
- The parent or related picklist references a field that does not exist on the target system.

- The parent or related picklist references a field that is not of type Picklist.
- The related picklist references a parent picklist that is referenced by another related picklist, because multiple parents for one picklist are not allowed.

The Enable Web Services Access and Customize Application privileges are required for an Upsert operation on a cascading picklist.

**NOTE:** Related picklist values override the existing picklist values during an Upsert operation.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific cascading picklist (if it exists) or insert the cascading picklist (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert Cascadi ngPi ckl i st Cascadi ngPi ckl i stXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *CascadingPicklistXML* is the fully qualified path name of the cascading picklist XML file, for example:

```
C: \My Fi les\My Cascadi ngPi ckl i st. xml
```

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a Cascading Picklist

The following is an example of updating a specific cascading picklist (if it exists) or inserting that cascading picklist (if it does not exist) in your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL Upsert Cascadi ngPi ckl i st "C: \My Fi les\My  
Cascadi ngPi ckl i st. xml "
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.



# 9

## Migrating Custom Web Link Fields

This chapter describes how to migrate custom Web link fields using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Custom Web Link Fields on page 77](#)
- [Privileges Required for Migrating Custom Web Link Fields on page 77](#)
- [Elements and Sections in the Custom Web Links XML Output File on page 78](#)
- [Migrating Custom Web Link Fields on page 79](#)

### Custom Web Link Fields

Custom Web link fields allow you to create context-sensitive hyperlinks in your page layouts.

[Table 20](#) describes the Oracle Migration Tool On Demand client commands used with custom Web link fields. For more information about running these commands, see [“Migrating Custom Web Link Fields” on page 79](#).

Table 20. Commands Used with Custom Web Link Fields in Oracle Migration Tool On Demand

| Command   | Description  |
|---|--|
| <code>Read CustomWebLink <i>SystemNameOfObject</i></code> | This command exports all custom Web link fields for a specific record type (object).<br><br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> . |
| <code>ReadAll CustomWebLink</code>                        | This command exports all custom Web link fields for all objects.   |
| <code>Upsert CustomWebLink <i>CustomWebLinkXML</i></code> | This command updates or inserts a custom Web link, as required.  |

### Privileges Required for Migrating Custom Web Link Fields

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll command: Enable Web Services Access and Customize Application.

- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Custom Web Links XML Output File

Table 21 describes the elements and sections in the custom Web links XML output file.

Table 21. Elements and Sections in the Custom Web Links XML File

| Element or Section   | Description  |
|--|--|
| <code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>                        | This element contains the system name of the object, for example, Account.   |
| <code>&lt;data:Name&gt;MyWebLink&lt;/data:Name&gt;</code>                                  | This element contains the system name of the custom Web link.  |
| <code>&lt;data:IntegrationTag&gt;My_Web_Link&lt;/data:IntegrationTag&gt;</code>            | This element contains the custom language-independent symbolic identifier for the custom Web link.   |
| <code>&lt;data:DisplayText&gt;MyDisplayText&lt;/data:DisplayText&gt;</code>                | This element contains the display text information for the custom Web link.  |
| <code>&lt;data:WebLinkTarget&gt;Open in Custom Tab&lt;/data:WebLinkTarget&gt;</code>       | This element specifies the Web link target information for the custom Web link. This element can have the following values: <ul style="list-style-type: none"> <li>■ <b>Open in Current window.</b> In the UI, this element opens the link in the current window.</li> <li>■ <b>Open in New window.</b> In the UI, this element opens the link in a new window.</li> <li>■ <b>Open in Custom Tab.</b> In the UI, this element opens the link in a custom tab.</li> </ul> |
| <code>&lt;data:TargetCustomWebTab&gt;MyCustomWebTab&lt;/data:TargetCustomWebTab&gt;</code> | This element specifies the custom Web link to which the Web link navigates when it is clicked. This element is applicable only when the <code>&lt;WebLinkTarget&gt;</code> element has a value of: Open in Custom Tab.   |
| <code>&lt;data:RefreshParentWindow&gt;false&lt;/data:RefreshParentWindow&gt;</code>        | This element specifies the Refresh Parent Window value (True or False) for the custom Web link, if the <code>&lt;WebLinkTarget&gt;</code> element has a value of: Open in New Window.  |

Table 21. Elements and Sections in the Custom Web Links XML File

| Element or Section  | Description  |
|---|--|
| <code>&lt;data: DisplayOptions&gt;B&lt;/data: DisplayOptions&gt;</code>   | This element specifies the Display Option value for the custom Web link. This element can have the following values: <ul style="list-style-type: none"> <li>■ <b>D.</b> Represents a Detail page</li> <li>■ <b>E.</b> Represents an Edit page</li> <li>■ <b>B.</b> Represents both a Detail page and an Edit page</li> </ul> |
| <code>&lt;data: ActiveLinkCondition&gt;TRUE&lt;/data: ActiveLinkCondition&gt;</code>  | This element specifies the active link condition value for the custom Web link.  |
| <code>&lt;data: DisplayLinkCondition&gt;TRUE&lt;/data: DisplayLinkCondition&gt;</code>  | This element specifies the display link condition value for the custom Web link.   |
| <code>&lt;data: URL&gt;http://www.someURL.com&lt;/data: URL&gt;</code>  | This element specifies the URL value for the custom Web link.  |
| <code>&lt;data: ListOfWebLinkTranslations&gt; &lt;data: WebLinkTranslation&gt; &lt;data: DisplayName&gt;MyWebLink&lt;/data: DisplayName&gt; &lt;data: DisplayText&gt;Click on me. &lt;/data: DisplayText&gt; &lt;data: LangCode&gt;ENU&lt;/data: LangCode&gt; &lt;/data: WebLinkTranslation&gt; &lt;/data: ListOfWebLinkTranslations&gt;</code> | This section describes the values for the supported languages.   |

## Migrating Custom Web Link Fields

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate custom Web link fields:

- [“Extracting Custom Web Link Fields for a Single Object” on page 79](#)
- [“Extracting Custom Web Link Fields for All Objects” on page 80](#)
- [“Updating or Inserting Custom Web Link Fields \(Upsert\)” on page 81](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting Custom Web Link Fields for a Single Object

This topic describes how to extract the custom Web link fields for a single object (for example, the Account object) from your Oracle CRM On Demand server for your environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the custom Web link fields for a single object:

```
mi grati ontool -u UserID -s ServerURL Read CustomWebLi nk SystemNameOfObj ect
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract all custom Web links fields, for example, Account. The system names for the record types are listed in ["System Names for Record Types" on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Custom Web Link Fields for a Single Object

The following is an example of extracting the custom Web link fields for a single object:

```
mi grati ontool -u UserID -s ServerURL Read CustomWebLi nk Account
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting Custom Web Link Fields for All Objects

This topic describes how to extract all custom Web link fields for all objects from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all custom Web link fields for all objects:

```
mi grati ontool -u UserID -s ServerURL ReadAl l CustomWebLi nk
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

### Example of Extracting All Custom Web Link Fields

The following is an example of extracting all custom Web link fields for all objects from your Oracle CRM On Demand server:



```
mi grati ontool -u UserID -s ServerURL ReadAll CustomWebLi nk
```

## Updating or Inserting Custom Web Link Fields (Upsert)

This topic describes how to update custom Web link fields (if they exist) or insert custom Web link fields (if they do not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update custom Web link fields (if they exist) or insert custom Web link fields (if they do not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert CustomWebLi nk CustomWebLi nkXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *CustomWebLinkXML* is the fully qualified path name of the custom Web link XML file, for example:

```
C: \My Fi l es\MyCustomWebLi nk. xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting Custom Web Link Fields

The following is an example of updating custom Web link fields (if they exist) or inserting custom Web link fields (if they do not exist) in your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL Upsert CustomWebLi nk "C: \My  
Fi l es\MyCustomWebLi nk. xml "
```

**NOTE:** Quotation marks are required only if the name contains spaces.



# 10 Migrating Concatenated Fields

This chapter describes how to migrate concatenated fields using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Concatenated Fields on page 83](#)
- [Privileges Required for Migrating Concatenated Fields on page 83](#)
- [Elements and Sections in the Concatenated Fields XML Output File on page 84](#)
- [Migrating Concatenated Fields on page 84](#)

## Concatenated Fields

Concatenated fields allow you to create a field that can display the values from multiple fields and can also display text.

[Table 22](#) describes the Oracle Migration Tool On Demand client commands used with concatenated fields. For more information about running these commands, see [“Migrating Concatenated Fields” on page 84](#).

Table 22. Commands Used with Concatenated Fields in Oracle Migration Tool On Demand

| Command   | Description   |
|---|---|
| Read ConcatenatedField <i>SystemNameOfObject</i>        | This command exports all concatenated fields for a specific record type (object).<br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> . |
| ReadAll ConcatenatedField                               | This command exports all concatenated fields for all objects.   |
| Upsert ConcatenatedField<br><i>ConcatenatedFieldXML</i> | This command updates or inserts a concatenated field, as required.  |

## Privileges Required for Migrating Concatenated Fields

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.

- For the Upsert and Create commands: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Concatenated Fields XML Output File

Table 23 describes the elements and sections in the concatenated fields XML output file.

Table 23. Elements and Sections in the Concatenated Fields XML File

| Element or Section   | Description   |
|--|---|
| <code>&lt;data: ObjectName&gt;Account&lt;/data: ObjectName&gt;</code>  | This element contains the system name of the object, for example, Account.                            |
| <code>&lt;data: Name&gt;ConcatenatedField&lt;/data: Name&gt;</code>  | This element contains the system name of the concatenated field.                                      |
| <code>&lt;data: IntegrationTag&gt;MyConcatenatedField&lt;/data: IntegrationTag&gt;</code>  | This element contains the custom language-independent symbolic identifier for the concatenated field. |
| <code>&lt;data: DisplayText&gt;MyDisplayText&lt;/data: DisplayText&gt;</code>  | This element contains the display text information for the concatenated field.                        |
| <code>&lt;data: ListOfConcatenatedFieldTranslations&gt;<br/>&lt;data: ConcatenatedFieldTranslation&gt;<br/>  &lt;data: DisplayName&gt;MyConcatenatedField&lt;/data: DisplayName&gt;<br/>  &lt;data: DisplayText&gt;Field 1 Field 2.&lt;/data: DisplayText&gt;<br/>  &lt;data: LangCode&gt;ENU&lt;/data: LangCode&gt;<br/>&lt;/data: ConcatenatedFieldTranslation&gt;<br/>&lt;/data: ListOfConcatenatedFieldTranslations&gt;</code> | This element contains the values for the supported languages.   |

## Migrating Concatenated Fields

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate concatenating fields:

- [“Extracting Concatenated Fields for a Single Object” on page 85](#)
- [“Extracting Concatenated Fields for All Objects” on page 85](#)
- [“Updating or Inserting Concatenated Fields \(Upsert\)” on page 86](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting Concatenated Fields for a Single Object

This topic describes how to extract the concatenated fields for a single object (for example, the Account object) from your Oracle CRM On Demand server for your environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the concatenated fields for a single object:

```
mi grati ontool -u UserID -s ServerURL Read ConcatenatedFi el d SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract all concatenated fields, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Concatenated Fields for a Single Object

The following is an example of extracting the concatenated fields for an object:

```
mi grati ontool -u UserID -s ServerURL Read ConcatenatedFi el d Account
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting Concatenated Fields for All Objects

This topic describes how to extract all concatenated fields from your Oracle CRM On Demand environment (customer test environment or production) for all objects.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all concatenated fields for all objects:

```
mi grati ontool -u UserID -s ServerURL ReadAl l ConcatenatedFi el d
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

### Example of Extracting All Concatenated Fields

The following is an example of extracting all concatenated fields from your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL ReadAll ConcatenatedField
```

## Updating or Inserting Concatenated Fields (Upsert)

This topic describes how to update concatenated fields (if they exist) or insert concatenated fields (if they do not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update concatenated fields (if they exist) or insert concatenated fields (if they do not exist):

```
migrationtool -u UserID -s ServerURL Upsert ConcatenatedField ConcatenatedFieldXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ConcatenatedFieldXML* is the fully qualified path name of the concatenated field XML file, for example:

```
C:\MyFiles\MyConcatenatedField.xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting Concatenated Fields

The following is an example of updating concatenated fields (if they exist) or inserting concatenated fields (if they do not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert ConcatenatedField "C:\MyFiles\MyConcatenatedField.xml"
```

**NOTE:** Quotation marks are required only if the name contains spaces.

# 11 Migrating Custom Web Applets

This chapter describes how to migrate custom Web applets by using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Custom Web Applets on page 87](#)
- [Privileges Required for Migrating Custom Web Applets on page 88](#)
- [Elements and Sections in the Web Applet XML Output File on page 89](#)
- [Migrating Custom Web Applets on page 92](#)

## Custom Web Applets

A *custom Web applet* embeds external Web content in Oracle CRM On Demand record-type Homepages or Detail pages, in the Action bar, or in the Home tab (My Homepage). Typically, the Web content is embedded by creating a custom Web applet that is added to the page layout for a Homepage or Detail page. For more information, see the topics about custom Web applets in *Oracle CRM On Demand Online Help*.

[Table 24](#) describes the Oracle Migration Tool On Demand client commands used with custom Web applets. For more information about running these commands, see [“Migrating Custom Web Applets” on page 92](#).

Table 24. Commands Used with Custom Web Applets in Oracle Migration Tool On Demand

| Command  | Description  |
|--|--|
| <code>Read HomepageCustomWebApplet</code><br><i>SystemNameOfObject</i><br>[ <i>HomePageWebAppletName</i> ]     | This command exports all the Homepage custom Web applets for a specified object, such as Account, or a specific Homepage custom Web applet for a specified record type (object), where: <ul style="list-style-type: none"><li>■ <i>SystemNameOfObject</i> is the specified record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a>.</li><li>■ <i>HomePageWebAppletName</i> is the name of a Homepage custom Web applet.</li></ul> |
| <code>Read DetailPageCustomWebApplet</code><br><i>SystemNameOfObject</i><br>[ <i>DetailPageWebAppletName</i> ] | This command exports all the Detail page custom Web applets for a specified object, such as Account, or a specific Detail page custom Web applet for a specified object, where: <ul style="list-style-type: none"><li>■ <i>SystemNameOfObject</i> is the specified record type.</li><li>■ <i>DetailPageWebAppletName</i> is the name of a Detail page custom Web applet.</li></ul>   |

Table 24. Commands Used with Custom Web Applets in Oracle Migration Tool On Demand

| Command   | Description   |
|---|---|
| Read <i>ActionBarCustomWebApplet</i><br><i>ActionBarWebAppletName</i>   | This command exports the specified Action bar custom Web applet from Oracle CRM On Demand.  |
| Read <i>HomeTabCustomWebApplet</i><br><i>HomeTabCustomWebAppletName</i> | This command exports the specified Home tab custom Web applet from Oracle CRM On Demand.  |
| ReadAll <i>WebAppletType</i>  | This command exports all custom Web applets of <i>WebAppletType</i> from Oracle CRM On Demand, where <i>WebAppletType</i> is one of the following: <ul style="list-style-type: none"> <li>■ <i>HomepageCustomWebApplet</i></li> <li>■ <i>DetailPageCustomWebApplet</i></li> <li>■ <i>ActionBarCustomWebApplet</i></li> <li>■ <i>HomeTabCustomWebApplet</i></li> </ul> |
| Upsert <i>WebAppletType</i> <i>MyWebAppletXML</i>                       | This command updates or inserts a custom Web applet into Oracle CRM On Demand, where <i>WebAppletType</i> is one of the following: <ul style="list-style-type: none"> <li>■ <i>HomepageCustomWebApplet</i></li> <li>■ <i>DetailPageCustomWebApplet</i></li> <li>■ <i>ActionBarCustomWebApplet</i></li> <li>■ <i>HomeTabCustomWebApplet</i></li> </ul>                 |

**NOTE:** Nonadministrative Oracle CRM On Demand users can run the ReadAll command.

## Privileges Required for Migrating Custom Web Applets

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll command: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access, Manage Custom Web Applets, and Customize Application. In addition, Detail page custom Web applets and Homepage custom Web applets also require Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.



# Elements and Sections in the Web Applet XML Output File

The following topics describe the elements and sections for various types of custom Web applet:

- [“Detail Page Custom Web Applets” on page 89](#)
- [“Action Bar Custom Web Applets” on page 90](#)
- [“Homepage Custom Web Applets” on page 90](#)
- [“Home Tab Custom Web Applets” on page 91](#)

## Detail Page Custom Web Applets

[Table 25](#) describes the elements and sections in the Detail page custom Web applet XML output file.

Table 25. Elements and Sections in the Detail Page Custom Web Applet XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: Obj ectName&gt;Account&lt;/data: Obj ectName&gt; &lt;data: Di spl ayName&gt;MyAppl et&lt;/data: Di spl ayName&gt; &lt;data: Descr i pt i on&gt;&lt;/data: Descr i pt i on&gt; &lt;data: Di spl ayNameCurrentUserLang&gt;ENU &lt;/data: Di spl ayNameCurrentUserLang&gt; &lt;data: Hei ght&gt;700&lt;/data: Hei ght&gt;</pre> | This section contains the Detail page custom Web applet elements.  |
| <pre>&lt;data: HTMLType&gt;   &lt;data: HTMLHeader&gt;&lt;/data: HTMLHeader&gt;   &lt;data: HTMLBody&gt;&lt;/data: HTMLBody&gt;   &lt;data: Al waysRun&gt;fal se&lt;/data: Al waysRun&gt; &lt;/data: HTMLType&gt;</pre>   | This section contains the elements for Detail page custom Web applets of type HTML.  |
| <pre>&lt;data: FeedType&gt;   &lt;data: URL&gt;&lt;/data: URL&gt;   &lt;data: Overri deURLFI ag&gt;fal se&lt;/data: Overri deURLFI ag&gt;   &lt;data: TargetWi ndow&gt;New Wi ndow&lt;/data: TargetWi ndow&gt; &lt;/data: FeedType&gt;</pre>  | This section contains the elements for Detail page custom Web applets of type Feed.  |
| <pre>&lt;data: URLType&gt;   &lt;data: URL&gt;&lt;/data: URL&gt;   &lt;data: Al waysRun&gt;fal se&lt;/data: Al waysRun&gt; &lt;/data: URLType&gt;</pre>   | This section contains the elements for Detail page Web applets of type URL.  |
| <pre>&lt;data: ModernI conName&gt;mod_account_25. png&lt;/data: ModernI conName&gt;</pre>   | This section contains the file name of the modern theme icon for the Detail Page Web applet. For more information about modern theme icons, see <a href="#">Appendix C, “Classic and Modern Theme Icons”</a> . |
| <pre>&lt;data: Li stOfTransl ati on&gt;   &lt;data: Transl ati on&gt;     &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt;     &lt;data: Di spl ayName&gt;MyAppl et&lt;/data: Di spl ayName&gt;   &lt;/data: Transl ati on&gt; &lt;/data: Li stOfTransl ati on&gt;</pre>  | This section contains the translation elements for the Detail page custom Web applet.  |

## Action Bar Custom Web Applets

Table 26 describes the elements and sections in the Action bar custom Web applet XML output file.

Table 26. Elements and Sections in the Action Bar Custom Web Applet XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: Di spl ayName&gt;Global webappl et&lt;/data: Di spl ayName&gt; &lt;data: Descri ption&gt;&lt;/data: Descri ption&gt; &lt;data: Di spl ayNameCurrentUserLang&gt;ENU &lt;/data: Di spl ayNameCurrentUserLang&gt; &lt;data: Hei ght&gt;200&lt;/data: Hei ght&gt;</pre> | This section contains the elements for the Action Bar custom Web applet.               |
| <pre>&lt;data: HTMLType&gt; &lt;data: HTMLHeader&gt;&lt;/data: HTMLHeader&gt; &lt;data: HTMLBody&gt;&lt;/data: HTMLBody&gt; &lt;data: Al waysRun&gt;true&lt;/data: Al waysRun&gt; &lt;/data: HTMLType&gt;</pre>  | This section contains the elements for the Action Bar custom Web applets of type HTML. |
| <pre>&lt;data: FeedType&gt; &lt;data: URL&gt;http://www.oracl e.com&lt;/data: URL&gt; &lt;data: Overri deURLFI ag&gt;true&lt;/data: Overri deURLFI ag&gt; &lt;data: TargetWi ndow&gt;New Wi ndow&lt;/data: TargetWi ndow&gt; &lt;/data: FeedType&gt;</pre>                         | This section contains the elements for the Action Bar custom Web applets of type Feed. |
| <pre>&lt;data: URLType&gt; &lt;data: URL&gt;http://www.oracl e.com&lt;/data: URL&gt; &lt;data: Al waysRun&gt;true&lt;/data: Al waysRun&gt; &lt;/data: URLType&gt;</pre>  | This section contains the elements for the Action Bar custom Web Applets of type URL.  |
| <pre>&lt;data: Li stOfTransl ati on&gt; &lt;data: Transl ati on&gt; &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt; &lt;data: Di spl ayName&gt;MyAppl et&lt;/data: Di spl ayName&gt; &lt;/data: Transl ati on&gt; &lt;/data: Li stOfTransl ati on&gt;</pre>               | This section contains the translation elements for the Action Bar custom Web applet.   |

## Homepage Custom Web Applets

Table 27 describes the elements and sections in the Homepage custom Web applet XML output file.

Table 27. Elements and Sections in the Homepage Custom Web Applet XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: Obj ectName&gt;Account&lt;/data: Obj ectName&gt; &lt;data: Di spl ayName&gt;AccountHomepageAppl et&lt;/data: Di spl ayName&gt; &lt;data: Descri ption&gt;Account web appl et&lt;/data: Descri ption&gt; &lt;data: Di spl ayNameCurrentUserLang&gt;ENU&lt;/data: Di spl ayNameCurrentUserLang&gt; &lt;data: Wi dth&gt;1&lt;/data: Wi dth&gt; &lt;data: Hei ght&gt;200&lt;/data: Hei ght&gt;</pre> | This section describes the elements for a Homepage custom Web applet.                 |
| <pre>&lt;data: HTMLType&gt; &lt;data: HTMLHeader&gt;&lt;/data: HTMLHeader&gt; &lt;data: HTMLBody&gt;&lt;/data: HTMLBody&gt; &lt;/data: HTMLType&gt;</pre>   | This section describes the elements for the Homepage custom Web applets of type HTML. |

Table 27. Elements and Sections in the Homepage Custom Web Applet XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: FeedType&gt;   &lt;data: URL&gt;&lt;/data: URL&gt;   &lt;data: Overri deURLFI ag&gt;fal se&lt;/data: Overri deURLFI ag&gt;   &lt;data: TargetWi ndow&gt;New Wi ndow&lt;/data: TargetWi ndow&gt; &lt;/data: FeedType&gt;</pre>                                     | This section describes the elements for the Homepage custom Web applets of type Feed. |
| <pre>&lt;data: URLType&gt;   &lt;data: URL&gt;&lt;/data: URL&gt; &lt;/data: URLType&gt;</pre>  | This section describes the elements for the Homepage custom Web applets of type URL.  |
| <pre>&lt;data: Li stOfTransl ati on&gt;   &lt;data: Transl ati on&gt;     &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt;     &lt;data: Di spl ayName&gt;MyAppl et&lt;/data: Di spl ayName&gt;   &lt;/data: Transl ati on&gt; &lt;/data: Li stOfTransl ati on&gt;</pre> | This section contains the translation elements for the Homepage custom Web applet.    |

## Home Tab Custom Web Applets

Table 28 describes the elements and sections in the Home tab custom Web applet XML output file.

Table 28. Elements and Sections in the Home Tab Custom Web Applet XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: Di spl ayName&gt;Gl obal WebAppl et&lt;/data: Di spl ayName&gt; &lt;data: Descri ption&gt;&lt;/data: Descri ption&gt; &lt;data: Di spl ayNameCurrentUserLang&gt;ENU&lt;/data: Di spl ayNameCurrentUserLang&gt; &lt;data: Wi dth&gt;1&lt;/data: Wi dth&gt; &lt;data: Hei ght&gt;200&lt;/data: Hei ght&gt;</pre> | This section lists the elements for Home tab custom Web applets.                   |
| <pre>&lt;data: HTMLType&gt;   &lt;data: HTMLHeader&gt;&lt;/data: HTMLHeader&gt;   &lt;data: HTMLBody&gt;&lt;/data: HTMLBody&gt; &lt;/data: HTMLType&gt;</pre>   | This section lists the elements for Home tab custom Web applets of type HTML.      |
| <pre>&lt;data: FeedType&gt;   &lt;data: URL&gt;&lt;/data: URL&gt;   &lt;data: Overri deURLFI ag&gt;fal se&lt;/data: Overri deURLFI ag&gt;   &lt;data: TargetWi ndow&gt;New Wi ndow&lt;/data: TargetWi ndow&gt; &lt;/data: FeedType&gt;</pre>  | This section lists the elements for Home tab custom Web applets of type Feed.      |
| <pre>&lt;data: URLType&gt;   &lt;data: URL&gt;http: //www. oracl e. com&lt;/data: URL&gt; &lt;/data: URLType&gt;</pre>  | This section lists the elements for Home tab custom Web applets of type URL.       |
| <pre>&lt;data: Li stOfTransl ati on&gt;   &lt;data: Transl ati on&gt;     &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt;     &lt;data: Di spl ayName&gt;MyAppl et&lt;/data: Di spl ayName&gt;   &lt;/data: Transl ati on&gt; &lt;/data: Li stOfTransl ati on&gt;</pre>  | This section contains the translation elements for the Home tab custom Web applet. |

# Migrating Custom Web Applets

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate custom Web applets:

- [“Extracting a Set of Custom Web Applets” on page 92](#)
- [“Extracting All Custom Web Applets” on page 94](#)
- [“Updating or Inserting a Custom Web Applet Definition \(Upsert\)” on page 95](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting a Set of Custom Web Applets

This topic describes how to extract a set of custom Web applets from the Oracle CRM On Demand server for your environment (customer test environment or production).

**NOTE:** Users require the `Enable Web Services Access` privilege to run the `Read` operation. The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Syntax for Extracting Homepage Custom Web Applets

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web applets for Homepages of various record types:

```
mi grati ontool -u UserID -s ServerURL Read HomepageCustomWebApplet SystemNameOfObject [HomePageWebAppletName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to read a set of custom Web applets, for example, `Account`. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).
- *HomePageWebAppletName* is the name of the Homepage custom Web applet that you want to extract. This parameter is optional.

## Syntax for Extracting Detail Page Custom Web Applets

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web applets for Detail pages for various record types:

```
mi grati ontool -u UserID -s ServerURL Read DetailPageCustomWebApplet SystemNameOfObject [DetailPageWebAppletName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to read a set of custom Web applets, for example, Account.
- *DetailPageWebAppletName* is the name of the Detail page custom Web applet that you want to extract. This parameter is optional.

### Syntax for Extracting Action Bar Custom Web Applets

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web applets for Action bars:

```
migrationtool -u UserID -s ServerURL Read ActionBarCustomWebApplet  
[ActionBarWebAppletName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ActionBarWebAppletName* is the name of the Action bar custom Web applet that you want to extract. This parameter is optional.

### Syntax for Extracting Home Tab Custom Web Applets

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of custom Web applets for the Home tab:

```
migrationtool -u UserID -s ServerURL Read HomeTabCustomWebApplet  
[HomeTabWebAppletName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *HomeTabWebAppletName* is the name of the Home tab custom Web applet that you want to extract. This parameter is optional.

## Extracting All Custom Web Applets

This topic describes how to extract all custom Web applets from your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

**NOTE:** The Manage Custom Web Applets privilege is required to run the ReadAll command.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all custom Web applets for Oracle CRM On Demand Homepages, Detail pages, Action bar, and Home tab:

```
mi grati ontol -u UserID -s ServerURL ReadAll HomepageCustomWebAppl et
mi grati ontol -u UserID -s ServerURL ReadAll Detai l PageCustomWebAppl et
mi grati ontol -u UserID -s ServerURL ReadAll Acti onBarCustomWebAppl et
mi grati ontol -u UserID -s ServerURL ReadAll HomeTabCustomWebAppl et
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

The output from the Oracle Migration Tool On Demand client is located in the following directories:

```
mi grati on tool i nstal l/reposit ory/WebAppl etType/Object/WebAppl et. xml
```

where:

- *WebAppletType* is one of the following:
  - HomepageCustomWebApplet
  - DetailPageCustomWebApplet
  - ActionBarCustomWebApplet
  - HomeTabCustomWebApplet
- *Object* is the Oracle CRM On Demand object or record, for example, Account.
- *WebApplet.xml* is the series of XML files where the Web applet configuration data is stored, for example, first Web Applet.xml file, second Web Applet.xml file, and so on.

### Example of Extracting All Custom Web Applets for Homepages

The following is an example of extracting all custom Web applets in all Homepages from your Oracle CRM On Demand server:

```
mi grati ontol -u UserID -s ServerURL ReadAll HomepageCustomWebAppl et
```

## Updating or Inserting a Custom Web Applet Definition (Upsert)

This topic describes how to update a custom Web applet definition (if it exists) or insert the Web applet definition (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

**NOTE:** The *Enable Web Services Access* and *Customize Application* privileges are required to run the Upsert operation.

The configuration data is updated when the Web applet name exists in the target company for the object or record for which the Upsert operation is being run; otherwise the Web applet is inserted.

Table 29 shows the result of an Upsert operation if the target company has a Web applet called *My Custom Applet* for the Account object on the Detail page.

Table 29. Result of an Upsert Operation on a Target Company

| If the XML definition contains...                                      | Then the result is ...  |
|--|---|
| Name: My Custom Applet<br>Object: Account<br>Location: Detail Page     | The existing My Custom Web Applet is updated for the Account object, which is on the Detail page.   |
| Name: MY Custom Applet<br>Object: Account<br>Location: Detail Page     | MY Custom Applet is inserted into the target company. The company now contains the following Account Web Applets: <ul style="list-style-type: none"> <li>■ My Custom Applet</li> <li>■ MY Custom Applet</li> </ul>  |
| Name: My Custom Applet<br>Object: Opportunity<br>Location: Detail Page | My Custom Applet is inserted into the target company for the Opportunity object. The company now contains: <ul style="list-style-type: none"> <li>■ For the Account object: My Custom Applet</li> <li>■ For the Opportunity object: My Custom Applet</li> </ul>               |
| Name: My Custom Applet<br>Object: Global<br>Location: Action Bar       | My Custom Applet is inserted into the target company for the Global Web Applet section. The company now contains: <ul style="list-style-type: none"> <li>■ For the Account object: My Custom Applet</li> <li>■ For the Global Web Applet section: My Custom Applet</li> </ul> |

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a custom Web applet (if it exists) or inserting the custom Web applet (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert WebAppletType MyWebAppletXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *WebAppletType* is one of the following:
  - HomepageCustomWebApplet
  - DetailPageCustomWebApplet
  - ActionBarCustomWebApplet
  - HomeTabCustomWebApplet
- *MyWebAppletXML* is the fully qualified path name of the customized Web applet XML file, for example:

C:\My Files\MyWebApplet.xml

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Examples of Updating or Inserting a Custom Web Applet

The following are examples of updating a custom Web applet (if it exists) or inserting the Web applet (if it does not exist) in your Oracle CRM On Demand server:

- For Homepage custom Web applets:

```
migratontool -u UserID -s ServerURL Upsert HomepageCustomWebApplet "C:\My Files\MyHomepageCustomWebApplet.xml "
```
- For Detail page custom Web applets:

```
migratontool -u UserID -s ServerURL Upsert DetailPageCustomWebApplet "C:\My Files\MyDetailPageCustomWebApplet.xml "
```
- For Action bar custom Web applets:

```
migratontool -u UserID -s ServerURL Upsert ActionBarCustomWebApplet "C:\My Files\MyActionBarCustomWebApplet.xml "
```
- For Home tab custom Web applets:

```
migratontool -u UserID -s ServerURL Upsert HomeTabCustomWebApplet "C:\My Files\MyHomeTabCustomWebApplet.xml "
```

**NOTE:** Quotation marks are required if the file name or path contains spaces.



# 12 Migrating Sales Assessment Templates

This chapter describes how to migrate sales assessment templates by using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Sales Assessment Templates on page 97](#)
- [Privileges Required for Migrating Sales Assessment Templates on page 98](#)
- [Elements and Sections in the Sales Assessment Template XML Output File on page 98](#)
- [Migrating Sales Assessment Templates on page 99](#)

## Sales Assessment Templates

A *sales assessment template* (or assessment script) is a series of questions that helps Oracle CRM On Demand users to collect customer data. A sales assessment template can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, capture activity information, and so on. For more information, see the topics describing assessment scripts in the *Oracle CRM On Demand Online Help*.

[Table 30](#) describes the Oracle Migration Tool On Demand client commands used with sales assessment templates. For more information about running these commands, see [“Migrating Sales Assessment Templates” on page 99](#).

Table 30. Commands Used with Sales Assessment Templates in Oracle Migration Tool On Demand

| Command   | Description   |
|---|---|
| Read SalesAssessmentTemplate <i>AssessmentType</i>                  | This command exports sales assessment template configuration data of the type specified by <i>AssessmentType</i> , for example, activity assessment templates, from Oracle CRM On Demand. |
| ReadAll SalesAssessmentTemplate                                     | This command exports all sales assessment template configuration data in the Oracle CRM On Demand tenant.   |
| Upsert SalesAssessmentTemplate<br><i>MySalesAssessmentScriptXML</i> | This command updates or inserts sales assessment template configuration data in the Oracle CRM On Demand tenant.  |

**NOTE:** Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

## Privileges Required for Migrating Sales Assessment Templates

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access, Manage Assessments Access, and Manage Content.
- For the Upsert command: Enable Web Services Access, Manage Assessments Access, and Manage Content.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Sales Assessment Template XML Output File

Table 31 describes the elements and sections in the sales assessment template XML output file.

Table 31. Elements and Sections in the Sales Assessment Template XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: Name&gt;MyAssessment&lt;/data: Name&gt; &lt;data: Active&gt;true&lt;/data: Active&gt; &lt;data: Filter1&gt;&lt;/data: Filter1&gt; &lt;data: Filter2&gt;&lt;/data: Filter2&gt; &lt;data: Filter3&gt;&lt;/data: Filter3&gt; &lt;data: Filter4&gt;&lt;/data: Filter4&gt; &lt;data: AttributeValueNumber&gt;&lt;/data: AttributeValueNumber&gt; &lt;data: ChildScore&gt;&lt;/data: ChildScore&gt; &lt;data: Description&gt;Sales Assessment&lt;/data: Description&gt; &lt;data: Fiel dtoMapScoreTo&gt; &lt;/data: Fiel dtoMapScoreTo&gt; &lt;data: MaxAttrVal ue&gt;4&lt;/data: MaxAttrVal ue&gt; &lt;data: MaxPossibleScore&gt;&lt;/data: MaxPossibleScore&gt; &lt;data: MaxScore&gt;&lt;/data: MaxScore&gt; &lt;data: ResponseControl &gt;Drop-Down&lt;/data: ResponseControl &gt; &lt;data: SalesMethod&gt;&lt;/data: SalesMethod&gt; &lt;data: SalesStages&gt;&lt;/data: SalesStages&gt; &lt;data: Fiel dtoMapOutcomeVal ueTo&gt;   &lt;/data: Fiel dtoMapOutcomeVal ueTo&gt; &lt;data: RemoveCommentBox&gt;false&lt;/data: RemoveCommentBox&gt; &lt;data: OutcomeVal uel fThresholdMet&gt;   &lt;/data: OutcomeVal uel fThresholdMet&gt; &lt;data: OutcomeVal uel fThresholdNotMet&gt;   &lt;/data: OutcomeVal uel fThresholdNotMet&gt; &lt;data: ThresholdScore&gt;40&lt;/data: ThresholdScore&gt; &lt;data: Type&gt;Account Survey&lt;/data: Type&gt; &lt;data: TemplateType&gt;Assessment&lt;/data: TemplateType&gt;</pre> | <p>This section contains the elements for the <i>Key Assessment Information</i> section of the Assessment Script template.</p> |

Table 31. Elements and Sections in the Sales Assessment Template XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: SalesAssessmentTemplateAttribute&gt;   &lt;data: Question&gt;&lt;/data: Question&gt;   &lt;data: CriteriaName&gt;&lt;/data: CriteriaName&gt;   &lt;data: ChildNumber&gt;2&lt;/data: ChildNumber&gt;   &lt;data: ChildOrder&gt;1&lt;/data: ChildOrder&gt;   &lt;data: ChildScore&gt;100&lt;/data: ChildScore&gt;   &lt;data: AnswerMapToField&gt;&lt;/data: AnswerMapToField&gt;   &lt;data: MaxChild&gt;100&lt;/data: MaxChild&gt;   &lt;data: Order&gt;1&lt;/data: Order&gt;   &lt;data: ParentType&gt;Account Survey&lt;/data: ParentType&gt;   &lt;data: Weight&gt;50&lt;/data: Weight&gt;   &lt;data: WeightScore&gt;5000&lt;/data: WeightScore&gt;</pre> | <p>This section contains the elements for the <i>Criteria</i> section of the Assessment Script template.</p> |
| <pre>&lt;data: ListOfSalesAssessmentAttributeValue&gt;   &lt;data: SalesAssessmentAttributeValue&gt;     &lt;data: Description&gt;&lt;/data: Description&gt;     &lt;data: Order&gt;1&lt;/data: Order&gt;     &lt;data: Answer&gt;&lt;/data: Answer&gt;     &lt;data: Score&gt;100&lt;/data: Score&gt;   &lt;/data: SalesAssessmentAttributeValue&gt; &lt;/data: ListOfSalesAssessmentAttributeValue&gt;</pre>   | <p>This section contains the elements for the <i>Answer</i> section of the Assessment Script template.</p>   |

## Migrating Sales Assessment Templates

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate sales assessment templates:

- [“Extracting a Sales Assessment Template Configuration” on page 99](#)
- [“Extracting All Sales Assessment Templates” on page 100](#)
- [“Updating or Inserting a Specific Sales Assessment Template \(Upsert\)” on page 101](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Sales Assessment Template Configuration

This topic describes how to extract a set of sales assessment template configuration data from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

**NOTE:** Users require the `Enable Web Services Access` privilege to run the `Read` command.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of sales assessment templates:

```
mi migrationtool -u UserID -s ServerURL Read SalesAssessmentTemplate AssessmentType
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *AssessmentType* is the assessment type for which you want to read a set of sales assessment templates. It can be one of the following types:
  - **ActivityAssessment.** Activity assessment template configuration data.
  - **AccountSurvey.** Account survey assessment template configuration data.
  - **BusinessPlan Assessment.** Business plan assessment template configuration data.
  - **Contact Script.** Contact script assessment template configuration data.
  - **Lead Qualification.** Lead qualification assessment template configuration data.
  - **Objective Assessment.** Objective assessment template configuration data.
  - **Opportunity Assessment.** Opportunity assessment template configuration data.
  - **Service Request - Script.** Service request script assessment template configuration data.
  - **Service Request - Survey.** Service request survey assessment template configuration data.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Activity Assessment Template

The following is an example of extracting activity assessment template configuration data.

```
mi grati ontool -u UserID -s ServerURL Read Sal esAssessmentTempl ate Acti vi tyAssessment
```

## Extracting All Sales Assessment Templates

This topic describes how to extract all sales assessment template configuration data from your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all sales assessment template data:

```
mi grati ontool -u UserID -s ServerURL ReadAl l Sal esAssessmentTempl ate
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

The output from the Oracle Migration Tool On Demand client is located at:

```
migration tool install/repository/SalesAssessmentTemplate/object/assessment  
name.xml
```

For example, when you extract assessments for account survey objects, the output is located at the following location:

```
.../repository/SalesAssessmentTemplate/Account Survey/Account Assessment01.xml
```

### Example of Extracting All Sales Assessment Template Configuration Data

The following is an example of extracting all sales assessment templates from your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL ReadAll SalesAssessmentTemplate
```

## Updating or Inserting a Specific Sales Assessment Template (Upsert)

This topic describes how to update a specific sales assessment template configuration (if it exists) or insert the sales assessment template configuration (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

**NOTE:** The *Manage Assessments Access* and *Manage Content* privileges are required to run the Upsert operation.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific sales assessment template configuration (if it exists) or insert the sales assessment template configuration (if it does not exist):

```
migrationtool -u UserID -s ServerURL Upsert SalesAssessmentTemplate  
MySalesAssessmentScriptXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *MySalesAssessmentScriptXML* is the fully qualified path name of the sales assessment template XML file, for example:

C:\My Files\MySalesAssessmentScript.xml

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting Sales Assessment Template Configuration Data

The following is an example of updating sales assessment template configuration (if it exists) or inserting the sales assessment template configuration (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert SalesAssessmentTemplate "C:\My Files\MySalesAssessmentTemplate.xml"
```

**NOTE:** Quotation marks are required if the file name or path contains spaces.

# 13 Migrating Homepage Layouts

This chapter describes how to migrate homepage layouts using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Homepage Layouts on page 103](#)
- [Privileges Required for Migrating Homepage Layouts on page 103](#)
- [Elements and Sections in the Homepage Layout XML Output File on page 104](#)
- [Migrating Homepage Layouts on page 107](#)

## Homepage Layouts

A *homepage layout* for a record type provides the most relevant information to different users for that record type. Most homepage layouts display the tasks related to the types of records that correspond to that page, for example, account-related tasks for the Accounts homepage. Generally, they also display filtered lists that have been defined by your administrator, and an analytic chart relevant to your work. Homepage layouts can also contain Web widgets, RSS feeds, and other Web content, depending on what your company administrator has set up. From the homepage for a record type, you can drill down to other pages to manage the various types of information as required.

[Table 32](#) describes the Oracle Migration Tool On Demand client commands used with homepage layouts. For more information about running these commands, see [“Extracting All Homepage Layouts” on page 107](#).

Table 32. Commands Used with Homepage Layouts in Oracle Migration Tool On Demand

| Command  | Description   |
|--|---|
| ReadAll HomepageLayout                         | This command exports all homepage layouts for all objects.      |
| Upsert HomepageLayout <i>HomepageLayoutXML</i> | This command updates or inserts a homepage layout, as required. |

## Privileges Required for Migrating Homepage Layouts

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For Read and ReadAll commands: Enable Web Services Access and Customize Application.

- For the Upsert command: Enable Web Services Access, Customize Application, and Customize Application - Manage Homepage Customizations. Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Homepage Layout XML Output File

Table 33 describes the elements and sections in the Homepage layout XML output file.

Table 33. Elements and Sections in the Homepage Layout XML File

| Element or Section  | Description  |
|---|--|
| <code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>   | This element contains the system name of the object to which the homepage layout refers.   |
| <code>&lt;data:LayoutName&gt;Account Default Layout&lt;/data:LayoutName&gt;</code>  | This element contains the name of the homepage layout.   |
| <code>&lt;data:Description&gt;My Account Homepage Layout&lt;/data:Description&gt;</code>  | This element contains a description of the homepage layout.  |
| <code>&lt;data:ListOfAvailableSection&gt;<br/>           &lt;data:AvailableSection&gt;<br/>             &lt;data:SectionName&gt;AccountRecentlyApplied<br/>             &lt;/data:SectionName&gt;<br/>             &lt;data:SectionLayoutName&gt;MyRecentlyModifiedAccounts<br/>             &lt;/data:SectionLayoutName&gt;<br/>           &lt;/data:AvailableSection&gt;<br/>         &lt;/data:ListOfAvailableSection&gt;</code> | This section contains all the sections that are displayed in the Available column of the Oracle CRM On Demand UI for the homepage layout. For information about how a section layout name (<SectionLayoutName>) is mapped to its corresponding UI value, see <a href="#">“Homepage Section Layout Mapping” on page 425</a> . |



Table 33. Elements and Sections in the Homepage Layout XML File

| Element or Section   | Description  |
|--|--|
| <pre> &lt;data: ListOfSelectedSection&gt;   &lt;data: SelectedSection&gt;     &lt;data: SectionName&gt;PdqList&lt;/data: SectionName&gt;     &lt;data: SectionLayoutName&gt;HomepageAccountList   &lt;/data: SectionLayoutName&gt;     &lt;data: Sequence&gt;0&lt;/data: Sequence&gt;   &lt;/data: SelectedSection&gt; &lt;/data: ListOfSelectedSection&gt; </pre> | <p>This section contains all the sections that are displayed in the left-side column and right-side column of the Oracle CRM On Demand UI for the homepage:</p> <ul style="list-style-type: none"> <li>■ &lt;SectionName&gt; contains an internal applet name that is associated with the SectionLayoutName. Do not modify this element.</li> <li>■ &lt;SectionLayoutName&gt; contains the section layout name. For reference information about how a section layout name is mapped to its corresponding UI name, see <a href="#">“Homepage Section Layout Mapping” on page 425</a>.</li> <li>■ &lt;Sequence&gt; determines the column in which the section is displayed: <ul style="list-style-type: none"> <li>■ All even numbers, including 0 (zero), display the specified section in the left-side column, where 0 (zero) is the first section of the left-side column.</li> <li>■ All odd numbers display the section in the right-side column, where a value of 1 is the top (or first) section.</li> </ul> </li> </ul> |

For more information about the mapping of the section layout name to the corresponding UI section name for homepage layouts, see [“Homepage Section Layout Mapping” on page 425](#).

## About the PdqList Section Name

In the <ListOfSelectedSection> section in [“Elements and Sections in the Homepage Layout XML File” on page 104](#), the section name, PdqList, is an applet name. The applet name specified in the corresponding object homepage XML file (for example, in AccountHomepage.xml or ContactHomepage.xml) is the same, but the layout name is different.

For example, for the Account homepage object, the applet name, layout name, and display name might be as follows:

- Applet Name: PdqList
- Layout Name: HomepageAccountList
- Display Name: Account Lists

For example, for the Contact homepage object, the applet name, layout name, and display name might be as follows:

- Applet Name: PdqList
- Layout Name: HomepageContactList
- Display Name: Contact Lists

## Example of Sequence Values in the Section: ListOfSelectedSection

Figure 1 represents the left and right side of the Accounts homepage UI. Exporting this homepage generates the <ListOfSelectedSection> section in the XML code displayed in [Example of Generated XML Code for the Sequence Values](#). The sequence numbers for the left-side column and right-side column displayed in [Example of Generated XML Code for the Sequence Values](#) are highlighted in bold in the XML code.

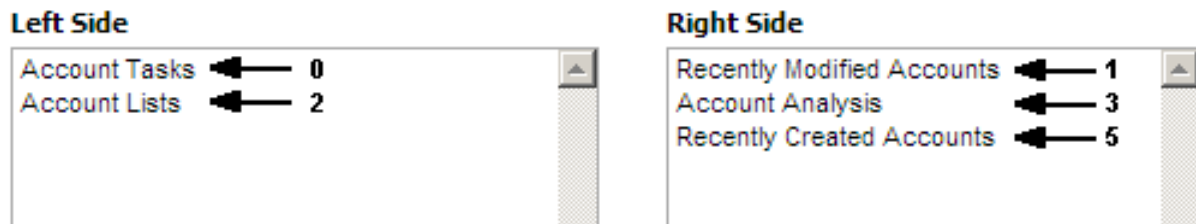


Figure 1. Example XML Code for the Sequence Values in the <ListOfSelectedSection> Section

### Example of Generated XML Code for the Sequence Values

The following example displays the generated XML code for sequence values:

```
<data: ListOfSelectedSection>
  <data: SelectedSection>
    <data: SectionName>AccountRelatedTasks</data: SectionName>
    <data: SectionLayoutName>AllOpenAccountTasks</data: SectionLayoutName>
    <data: Sequence>0</data: Sequence>
  </data: SelectedSection>
  <data: SelectedSection>
    <data: SectionName>AccountRecentlyApplet</data: SectionName>
    <data: SectionLayoutName>AllRecentlyModifiedAccounts</data: SectionLayoutName>
    <data: Sequence>1</data: Sequence>
  </data: SelectedSection>
</data: SelectedSection>
```

```

    <data: SectionName>Pdqlist</data: SectionName>
    <data: SectionLayoutName>HomepageAccountList</data: SectionLayoutName>
    <data: Sequence>2</data: Sequence>
  </data: SelectedSection>
  <data: SelectedSection>
    <data: SectionName>HomePageListAnalyticsRevenue</data: SectionName>
    <data: SectionLayoutName>Account Analysis Report</data: SectionLayoutName>
    <data: Sequence>3</data: Sequence>
  </data: SelectedSection>
  <data: SelectedSection>
    <data: SectionName>AccountRecentlyApplied</data: SectionName>
    <data: SectionLayoutName>All Recently Created Accounts</data: SectionLayoutName>
    <data: Sequence>5</data: Sequence>
  </data: SelectedSection>
</data: ListOfSelectedSection>

```

## Migrating Homepage Layouts

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with homepage layouts:

- [“Extracting All Homepage Layouts” on page 107](#)
- [“Updating or Inserting a Homepage Layout \(Upsert\)” on page 108](#)

### Extracting All Homepage Layouts

The following topic describes how to extract all homepage layouts from your Oracle CRM On Demand environment (customer test environment or production).

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all homepage layouts:

```
migrationtool -u UserID -s ServerURL ReadAll HomepageLayout
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Homepage Layouts

The following is an example of extracting all homepage Layouts from your Oracle CRM On Demand server:

```
mi migrationtool -u UserID -s ServerURL ReadAll HomepageLayout
```

### Updating or Inserting a Homepage Layout (Upsert)

This topic describes how to update a specific homepage layout (if it exists), or insert that homepage layout (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production). For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*. It is specified using the Upsert command.

An update to a homepage layout is derived from the homepage layout system name. That is, if you run an Upsert operation on a homepage layout where the homepage layout system name in the XML file is *My Homepage*, and a homepage layout of the same name exists in the target company, then the target homepage layout is updated. If the homepage layout does not exist on the target company, then the homepage layout is inserted on the target. The matching of the homepage layout name is also case sensitive. For example, if the homepage layout system name in the XML file is *MY Homepage* and the target access profile is *My Homepage* (no uppercase *Y*), then the *MY Homepage* homepage layout is inserted in the target.

The Enable Web Services Access and Customize Application privileges are required for an Upsert operation on a homepage layout.

**NOTE:** Users cannot reference record names or section names that are not set up on the target system in an Upsert operation.

### Sequence Tags

The <Sequence> tag in the homepage layout XML must contain all the sequence values for the layout.

For example, the following are acceptable sequence values for the Upsert operation:

```
0, 1, 2
0, 1, 3
0, 2, 4
0
1
1, 3
0, 1, 3
```

The following sequence values are not acceptable for an Upsert operation:

- -1 is not acceptable because only positive integers are acceptable
- 0, 0, 1, 2 is not acceptable because duplicates must not exist
- 2 is not acceptable because the first left side value (that is, 0) is missing
- 3 is not acceptable, because the first right side value (that is, 1) is missing

- 1, 2 is not acceptable because the first left side value (that is, 0) is missing
- 0, 3 is not acceptable because the first right side value (that is, 1) is missing
- 0,1,2,5 is not acceptable, because the second right side value (that is, 3) is missing
- 0, 2, 3 is not acceptable, because the first right side value (that is, 1) is missing

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific homepage layout (if it exists) or insert the homepage layout (if it does not exist):

```
mi gratio ntool -u UserID -s ServerURL Upsert HomepageLayout HomepageLayoutXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *HomepageLayoutXML* is the fully qualified path name of the homepage layout XML file, for example:

```
C:\My Files\My HomepageLayout.xml
```

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting a Homepage Layout

The following is an example of updating a specific homepage layout (if it exists) or inserting that homepage layout (if it does not exist) in your Oracle CRM On Demand server:

```
mi gratio ntool -u UserID -s ServerURL Upsert HomepageLayout "C:\My Files\My  
HomepageLayout.xml "
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.



# 14 Migrating Action Bar Layouts

This chapter describes how to migrate Action bar layouts using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Action Bar Layouts on page 111](#)
- [Privileges Required for Migrating Action Bar Layouts on page 112](#)
- [Elements and Sections in the Action Bar Layout XML Output File on page 112](#)
- [Migrating Action Bar Layouts on page 115](#)

## Action Bar Layouts

An *Action bar layout* is the arrangement of the Action bar components, which appear on the left side of all Oracle CRM On Demand pages. Components typically include sections, such as the following: the Message Center, Search, Communication Tools, Create, Recently Viewed, Favorite Records, Favorite Lists, and Calendar.

[Table 34](#) describes the Oracle Migration Tool On Demand client commands used with Action bar layouts. For more information about running these commands, see [“Migrating Action Bar Layouts” on page 115](#).

Table 34. Commands Used with Action Bar Layouts in Oracle Migration Tool On Demand

| Command   | Description   |
|---|---|
| ReadAll Acti onBarLayout                              | This command exports all Action bar layouts for all objects.  |
| Upsert Acti onBarLayout<br><i>Acti onBarLayoutXML</i> | This command updates or inserts an Action bar layout, as required.<br><br><b>NOTE:</b> The matching criteria for an update to occur are derived from the value between the <code>&lt;LayoutName&gt;</code> tag and the <code>&lt;/LayoutName&gt;</code> tag. The matching criteria are case sensitive. For example, <code>&lt;LayoutName&gt;My Custom Action Bar Layout&lt;/LayoutName&gt;</code> and <code>&lt;LayoutName&gt;MY Custom Action Bar Layout&lt;/LayoutName&gt;</code> are considered two different layouts (because the first layout name contains <i>My</i> , while the second layout name contains <i>MY</i> ). |

## Privileges Required for Migrating Action Bar Layouts

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access and Customize Application.
- For the Upsert command: Enable Web Services Access and Customize Application.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Action Bar Layout XML Output File

Table 35 describes the elements and sections in the Action bar layout XML output file.

Table 35. Elements and Sections in the Action Bar Layout XML File

| Element or Section   | Description  |
|--|--|
| <code>&lt;data:LayoutName&gt;My Custom Action Bar Layout<br/>&lt;/data:LayoutName&gt;</code>           | This element contains the system name of the Action bar layout.              |
| <code>&lt;data:Description&gt;Custom Action Bar Layout<br/>Description&lt;/data:Description&gt;</code> | This element contains the description information for the Action bar layout. |



Table 35. Elements and Sections in the Action Bar Layout XML File

| Element or Section   | Description  |
|--|--|
| <pre> &lt;data: ListOfSections&gt;   &lt;data: Section&gt;     &lt;data: Name&gt;Global Search Multi Field&lt;/data: Name&gt;     &lt;data: Displayed&gt;true&lt;/data: Displayed&gt;     &lt;data: Sequence&gt;-2&lt;/data: Sequence&gt;     &lt;data: GlobalHeaderSection&gt;false&lt;/data: GlobalHeaderSection&gt;   &lt;/data: Section&gt;   &lt;data: Section&gt;     &lt;data: Name&gt;Quick Message Center&lt;/data: Name&gt;     &lt;data: Displayed&gt;true&lt;/data: Displayed&gt;     &lt;data: Sequence&gt;-2&lt;/data: Sequence&gt;     &lt;data: GlobalHeaderSection&gt;false&lt;/data: GlobalHeaderSection&gt;   &lt;/data: Section&gt;   &lt;data: Section&gt;     &lt;data: Name&gt;Calendar Action Applet&lt;/data: Name&gt;     &lt;data: Displayed&gt;false&lt;/data: Displayed&gt;     &lt;data: Sequence&gt;-1&lt;/data: Sequence&gt;     &lt;data: GlobalHeaderSection&gt;false&lt;/data: GlobalHeaderSection&gt;   &lt;/data: Section&gt;   &lt;data: Section&gt;     &lt;data: Name&gt;Quick Favorite Lists&lt;/data: Name&gt;     &lt;data: Displayed&gt;true&lt;/data: Displayed&gt;     &lt;data: Sequence&gt;3&lt;/data: Sequence&gt;     &lt;data: GlobalHeaderSection&gt;false&lt;/data: GlobalHeaderSection&gt;   &lt;/data: Section&gt;   &lt;data: Section&gt;     &lt;data: Name&gt;Quick History&lt;/data: Name&gt;     &lt;data: Displayed&gt;true&lt;/data: Displayed&gt;     &lt;data: Sequence&gt;1&lt;/data: Sequence&gt;     &lt;data: GlobalHeaderSection&gt;true&lt;/data: GlobalHeaderSection&gt;   &lt;/data: Section&gt;   &lt;data: Section&gt;     &lt;data: Name&gt;Quick Favorite Records&lt;/data: Name&gt;     &lt;data: Displayed&gt;true&lt;/data: Displayed&gt;     &lt;data: Sequence&gt;2&lt;/data: Sequence&gt;     &lt;data: GlobalHeaderSection&gt;true&lt;/data: GlobalHeaderSection&gt;   &lt;/data: Section&gt;   &lt;data: Section&gt;     &lt;data: Name&gt;Quick Create&lt;/data: Name&gt;     &lt;data: Displayed&gt;true&lt;/data: Displayed&gt;     &lt;data: Sequence&gt;0&lt;/data: Sequence&gt;     &lt;data: GlobalHeaderSection&gt;false&lt;/data: GlobalHeaderSection&gt;   &lt;/data: Section&gt; &lt;/data: ListOfSections&gt; </pre> | <p>This section describes the contents of the Action Bar. The order of content displayed in the Action bar is determined by numeric values. The numeric values include:</p> <ul style="list-style-type: none"> <li>■ A value of -2 indicates that the contents are in the Not Available section.</li> <li>■ A value of -1 indicates that the contents are in the Available section.</li> <li>■ A value of -3 indicates the contents are in the Global Header section.</li> <li>■ Positive integers (for example, 0, 1, 2, 3, and so on) indicate that the contents are in the Displayed section, and the value indicates the location of the content, with 0 (zero) meaning the content is located at the top of the section.</li> </ul> |

Table 35. Elements and Sections in the Action Bar Layout XML File

| Element or Section   | Description  |
|--|--|
| <pre> &lt;data: ListOfGlobalHeaders&gt;   &lt;data: GlobalHeader&gt;     &lt;data: Order&gt;1&lt;/data: Order&gt;     &lt;data: Icon&gt;202&lt;/data: Icon&gt;     &lt;data: Applet&gt;GlobalHeader Create&lt;/data: Applet&gt;     &lt;data: AppletWidth&gt;0&lt;/data: AppletWidth&gt;     &lt;data: AppletDescription/&gt;   &lt;/data: GlobalHeader&gt;   &lt;data: GlobalHeader&gt;     &lt;data: Order&gt;3&lt;/data: Order&gt;     &lt;data: Icon&gt;205&lt;/data: Icon&gt;     &lt;data: Applet&gt;Quick Favorite Records&lt;/data: Applet&gt;     &lt;data: AppletWidth&gt;160&lt;/data: AppletWidth&gt;     &lt;data: AppletDescription/&gt;   &lt;/data: GlobalHeader&gt;   &lt;data: GlobalHeader&gt;     &lt;data: Order&gt;2&lt;/data: Order&gt;     &lt;data: Icon&gt;202&lt;/data: Icon&gt;     &lt;data: Applet&gt;Quick History&lt;/data: Applet&gt;     &lt;data: AppletWidth&gt;160&lt;/data: AppletWidth&gt;     &lt;data: AppletDescription/&gt;   &lt;/data: GlobalHeader&gt; &lt;/data: ListOfGlobalHeaders&gt; </pre> | <p>This section contains the details for the global header sections:</p> <ul style="list-style-type: none"> <li>■ &lt;Order&gt; contains the order in which the section is displayed in the global header (required).</li> <li>■ &lt;Icon&gt; contains the name of the icon for the section (required).</li> <li>■ &lt;Applet&gt; contains the name of the section (required).</li> <li>■ &lt;AppletWidth&gt; contains the width of the section (required).</li> <li>■ &lt;AppletDescription&gt; contains a description of the section.</li> </ul> |

### Name Element Value to UI Value Mapping for Applets

Table 36 maps the <Name> element values in the XML to the values in the Oracle CRM On Demand UI for the preconfigured applets. See Table 35 for more information about the <Name> element.

Table 36. Name Element Value to UI Value Mapping for Oracle CRM On Demand Applets

| Name Element Value in XML File | UI Value                |
|--------------------------------|-------------------------|
| Calendar Action Applet         | Calendar                |
| Enhanced Text Search           | Enhanced Keyword Search |
| Global Search Multi Field      | Search                  |
| Quick Create                   | Create                  |
| Quick Favorite Lists           | Favorite Lists          |
| Quick Favorite Records         | Favorite Records        |
| Quick History                  | Recently Viewed         |
| Quick Message Center           | Message Center          |

# Migrating Action Bar Layouts

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate Action bar layouts:

- [“Extracting All Action Bar Layouts” on page 115](#)
- [“Updating or Inserting an Action Bar Layout \(Upsert\)” on page 115](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting All Action Bar Layouts

This topic describes how to extract all Action bar layouts from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all Action bar layouts:

```
mi grati ontool -u UserID -s ServerURL ReadAll Acti onBarLayout
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Action Bar Layouts

The following is an example of extracting all Action bar layouts from your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAll Acti onBarLayout
```

## Updating or Inserting an Action Bar Layout (Upsert)

This topic describes how to update an Action bar layout (if it exists) or insert a custom Action bar layout (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

**NOTE:** Before you upsert an applet into the global header section child container, you must configure the applet in the global header section through the section child container.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update an Action bar layout (if it exists) or insert an Action bar layout (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert Acti onBarLayout Acti onBarLayoutXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands, for example, CompanyABC/jdoe.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides, for example, `https://secure-ausomx<abc>.crmondemand.com`, where *abc* is the tenant where your company resides.
- *ActionBarLayoutXML* is the fully qualified path name of the Action bar layout XML file, for example:

```
C:\My Files\MyActi onBarLayout.xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting an Action Bar Layout

The following is an example of updating an Action bar layout (if it exists) or inserting the action bar layout (if it does not exist) in your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL Upsert Acti onBarLayout "C:\My  
Files\MyActi onBarLayout.xml "
```

**NOTE:** Quotation marks are required only if the name contains spaces.

# 15 Migrating Related Information Layouts

This chapter describes how to migrate related information layouts using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Related Information Layouts on page 117](#)
- [Privileges Required for Migrating Related Information Layouts on page 118](#)
- [Elements and Sections in the Related Information Layout XML Output File on page 118](#)
- [Migrating Related Information Layouts on page 120](#)

## Related Information Layouts

A *related information layout* defines how related information sections appear in an Oracle CRM On Demand page layout. Typically, you create related information layouts when customizing Oracle CRM On Demand by using the Page Layout wizard. For more information, see the topics describing the customization of related item layouts and customization of static page layouts in *Oracle CRM On Demand Online Help*.

[Table 37](#) describes the Oracle Migration Tool On Demand client commands used with related information layouts. For more information about running these commands, see [“Migrating Related Information Layouts” on page 120](#).

Table 37. Commands Used with Related Information Layouts in Oracle Migration Tool On Demand

| Command   | Description  |
|---|--|
| <code>Read RelatedInformationLayout<br/>SystemNameOfObject</code>       | This command exports a set of related information layouts from Oracle CRM On Demand.<br><br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> . |
| <code>ReadAll RelatedInformationLayout</code>                           | This command exports all related information layouts in the Oracle CRM On Demand tenant.   |
| <code>Upsert RelatedInformationLayout<br/>MyRelatedInfoLayoutXML</code> | This command updates or inserts a related information layout.  |

**NOTE:** Nonadministrative Oracle CRM On Demand users can run the Read and ReadAll commands.

## Privileges Required for Migrating Related Information Layouts

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Related Information Layout XML Output File

Table 38 describes the elements and sections in the related information layout XML output file.

Table 38. Elements and Sections in the Related Information Layout XML File

| Element or Section  | Description  |
|---|--|
| <code>&lt;data: IncludeAll&gt;false&lt;/data: IncludeAll&gt;</code>   | This element specifies whether the preconfigured related information layouts are returned in addition to the customized layouts. If it is set to true, then the preconfigured layouts are included. If it is set to false or null, then the preconfigured layouts are not included. The default setting is false.  |
| <code>&lt;data: CurrentUserOnly&gt;false&lt;/data: CurrentUserOnly&gt;</code>   | This element specifies whether the output must contain only the related information layouts that are associated with the current user's role. If it is set to true, then only the layouts that are associated with the current user's role are included. If it is set to false or null, then the output is not restricted to the layouts that are associated with the current user's role. The default setting is false. |
| <pre> &lt;data: RelatedInformationLayout&gt; &lt;data: ObjectName&gt;Account&lt;/data: ObjectName&gt; &lt;data: RelatedInformationName&gt;OpptyChildList &lt;/data: RelatedInformationName&gt; &lt;data: Name&gt;Opportunities&lt;/data: Name&gt; &lt;data: Description&gt;Test Related Opportunities &lt;/data: Description&gt;                     </pre> | This section contains the elements for related information layouts.  |

Table 38. Elements and Sections in the Related Information Layout XML File

| Element or Section   | Description   |
|--|---|
| <pre> &lt;data: RelatedInformationLayout&gt;   .   .   .   &lt;data: SortField&gt;Name&lt;/data: SortField&gt;   &lt;data: SortDir&gt;Ascending&lt;/data: SortDir&gt;   .   .   . &lt;/data: RelatedInformationLayout&gt; </pre> | <p>For certain record types only, you can specify how the related records are sorted in the related information section when a user opens the parent record Detail page, as follows:</p> <ul style="list-style-type: none"> <li>■ &lt;SortField&gt; corresponds to the Sort By field in the Page Layout wizard. It displays the name of the field that is used to sort the related records in the related information section when the parent record Detail page opens.</li> <li>■ &lt;SortDir&gt; corresponds to the Sort Order field in the Page Layout wizard. It specifies the sort order for the records in the related information section.</li> </ul> <p>The &lt;SortField&gt; and &lt;SortDir&gt; elements are applicable for the Opportunities related record type only, and only for the following parent record types:</p> <ul style="list-style-type: none"> <li>■ Account</li> <li>■ Campaign</li> <li>■ Contact</li> <li>■ Custom Object 01</li> <li>■ Custom Object 02</li> <li>■ Custom Object 03</li> <li>■ Dealer</li> <li>■ Objective</li> <li>■ Opportunity (the Sub-Opportunities related record type)</li> <li>■ Partner Program</li> </ul> <p>The valid values for the &lt;SortField&gt; element are: Created, Name, and Updated, which correspond to the Created: Date, Opportunity Name, and Modified: Date fields. The valid values for the &lt;SortDir&gt; element are Ascending and Descending.</p> |

Table 38. Elements and Sections in the Related Information Layout XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: ListOfSelectedField&gt;   &lt;data: SelectedField&gt;     &lt;data: FieldName&gt;Contact Full Name     &lt;/data: FieldName&gt;     &lt;data: Sequence&gt;0&lt;/data: Sequence&gt;   &lt;/data: SelectedField&gt;   &lt;data: SelectedField&gt;     &lt;data: FieldName&gt;Contact Phone&lt;/data: FieldName&gt;     &lt;data: Sequence&gt;1&lt;/data: Sequence&gt;   &lt;/data: SelectedField&gt; &lt;/data: ListOfSelectedField&gt;</pre> | <p>This section contains the elements for selected fields in related information layouts.</p> |

## Migrating Related Information Layouts

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate related information layouts:

- [“Extracting a Set of Related Information Layouts for a Single Object” on page 120](#)
- [“Extracting All Related Information Layouts for All Objects” on page 121](#)
- [“Updating or Inserting a Specific Related Information Layout \(Upsert\)” on page 122](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Set of Related Information Layouts for a Single Object

This topic describes how to extract a set of related information layouts for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

**NOTE:** Users require the `Enable Web Services Access` privilege to run the `Read` command.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a set of related information layouts for a single object:

```
migrationtool -u UserID -s ServerURL Read RelatedInformationLayout
SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.



- *SystemNameOfObject* is the name of the object (record type) for which you want to read a set of related information layouts, for example, Account. The system names for the record types are listed in “System Names for Record Types” on page 411.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting a Set of Related Information Layouts for a Single Object

The following is an example of extracting a set of related information layouts for the Account record type:

```
mi grati ontool -u UserID -s ServerURL Read RelatedI nformati onLayout Account
```

## Extracting All Related Information Layouts for All Objects

This topic describes how to extract all related information layouts for all objects from your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all related information layouts for all objects:

```
mi grati ontool -u UserID -s ServerURL ReadAll RelatedI nformati onLayout
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

The output from the Oracle Migration Tool On Demand client is located at:

```
migrati on tool install/reposit ory/Rel atedI nformati onLayout/Object/  
Rel atedI nformati onObject/LayoutName.xml
```

For example, when you extract related information list layouts for child account competitor lists, the output is located at the following location:

```
.../reposit ory/Rel atedI nformati onLayout/Account/AccountCompeti torChi l dLi st/My  
Custom Layout.xml
```

Also for example, when you extract related information list layouts for child account partner lists, the output is located at the following location:

```
.../repository/RelatedInformationLayout/Account/AccountPartnerChildList/My Custom Layout.xml
```

### Example of Extracting All Related Information Layouts for All Objects

The following is an example of extracting all related information layouts for all objects from your Oracle CRM On Demand server:

```
migratontool -u UserID -s ServerURL ReadAll RelatedInformationLayout
```

## Updating or Inserting a Specific Related Information Layout (Upsert)

This topic describes how to update a specific related information layout (if it exists) or to insert the related information layout (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment.

**NOTE:** The *Enable Web Services Access and Customize Application* privileges are required to run the Upsert operation.

The configuration data is updated when the System Layout Name exists in the target company for the specified object and related object. [Table 39](#) lists the results of an Upsert operation in different situations.

Table 39. Results of an Upsert Operation on a Related Information Layout XML File

| If the XML file definition contains...  | If the target company contains...   | Then the result is...              |
|---|---|------------------------------------|
| Object: Account<br>Related Object: Account Competitors<br>Layout Name: My Custom Layout | Object: Account<br>Related Object: Account Competitors<br>Layout: Standard Related Information Layout                             | A new My Custom Layout is inserted |
| Object: Account<br>Related Object: Account Competitors<br>Layout Name: My Custom Layout | Object: Account<br>Related Object: Account Competitors<br>Layouts:<br>■ Standard Related Information Layout<br>■ My Custom Layout | My Custom Layout is updated.       |

Table 39. Results of an Upsert Operation on a Related Information Layout XML File

| If the XML file definition contains...   | If the target company contains...   | Then the result is...  |
|--|---|--|
| Object: Account<br>Related Object: Account Competitors<br>Layout Name: Standard Related Information Layout | Object: Account<br>Related Object: Account Competitors<br>Layouts:<br>■ Standard Related Information Layout<br>■ My Custom Layout | An error is generated because Standard Related Information Layout cannot be updated. |

The Upsert operation has the same limitations as the Oracle CRM On Demand user interface (UI), and it fails if the following conditions occur:

- The XML file contains a layout name length longer than what the UI supports.
- The XML contains a description length longer than what the UI supports.
- The XML content references fields that do not exist on the target system.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific related information layout (if it exists) or insert the related information layout (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert RelatedI nformati onLayout  
MyRel atedI nfoLayoutXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *MyRelatedInfoLayoutXML* is the fully qualified path name of the related information layout XML file, for example:

```
C: \My Fi l es\MyRel atedI nfoLayout. xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting a Related Information Layout

The following is an example of updating a related information layout (if it exists) or inserting the related information layout (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert RelatedInformationLayout "C:\MyFiles\MyRelatedInfoLayout.xml"
```

**NOTE:** Quotation marks are required only if the file name or path contains spaces.

# 16 Migrating Access Profiles

This chapter describes how to migrate access profiles using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Access Profiles on page 125](#)
- [Privileges Required for Migrating Access Profiles on page 126](#)
- [Elements and Sections in the Access Profile XML Output File on page 126](#)
- [Migrating Access Profiles on page 128](#)

## Access Profiles

An *access profile* is the set of security permissions that determines what data a user can access.

[Table 40](#) describes the Oracle Migration Tool On Demand client commands that are used with access profiles. The commands are case sensitive. For examples of running these commands, see [“Migrating Access Profiles” on page 128](#).

Table 40. Oracle Migration Tool On Demand Commands for Access Profiles

| Command  | Description   |
|--|---|
| Read AccessProfile<br>[ <i>SystemNameOfAccessProfile</i> ] | This command exports a single access profile from an Oracle CRM On Demand server.                       |
| ReadAll AccessProfile [ <i>FolderLocation</i> ]            | This command exports all access profiles from an Oracle CRM On Demand server.                           |
| Upsert AccessProfile <i>AccessProfileXML</i>               | This command updates or inserts a single access profile on an Oracle CRM On Demand server, as required. |

**NOTE:** Do not assume that the system name of the access profile is the same as what you see in the user interface for Oracle CRM On Demand. For example, if you create an access profile called *My Access Profile* and later rename it to *My Renamed Access Profile*, then the system name continues to be *My Access Profile*. Therefore, if you want to read this specific access profile, then you must reference it by the name, *My Access Profile*, in your read request. The only way to determine the real name of an access profile that has been modified is to perform a ReadAll operation and export all the configuration data.

# Privileges Required for Migrating Access Profiles

The following privileges are required on the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access, and Manage Roles and Access.
- For the Upsert command: Enable Web Services Access, Manage Roles and Access, and the appropriate privilege to manage access to the relevant record type.

For example, if the access profile contains information about Custom Object 02, then the user role must have the Customize Application - Manage Custom Object 02 privilege. For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Access Profile XML Output File

Table 41 describes the elements and sections in the access profile XML output file.

Table 41. Elements and Sections in the Access Profile XML File

| Element or Section                              | Description  |
|---|--|
| <data: Name></data: Name>                       | This element contains the name of the access profile. This is the same name that is used to retrieve a single access profile.<br><br>This name never changes during any updates. When a new access profile is inserted, this name is used as the display name if a display name is not provided in the <AccessProfileTranslation> element of the XML file. |
| <data: NameTranslation></data: NameTranslation> | This element contains the name of the access profile in the user's language. This element is read-only and is ignored for Upsert requests.   |
| <data: AccessProfileId></data: AccessProfileId> | This element contains the access profile ID. This element is read-only and is ignored for Upsert requests.   |
| <data: Description></data: Description>         | This element contains the description of the access profile that is used if one is not provided in the <AccessProfileTranslation> element of the XML file.   |

Table 41. Elements and Sections in the Access Profile XML File

| Element or Section  | Description  |
|---|--|
| <data: Avai l abl eForTeam></data: Avai l abl eForTeam>   | This element indicates if the Grantable to Team Members privilege is checked in Step 1 of the Access Profile Wizard.   |
| <data: Avai l abl eForBook></data: Avai l abl eForBook>   | This element indicates if the Grantable to Book Users privilege is checked in Step 1 of the Access Profile Wizard.   |
| <data: Di sabl ed></data: Di sabl ed>   | This element indicates if the Disabled element is checked in Step 1 of the Access Profile Wizard.  |
| <pre> &lt;data: Li stOfAccessProfi l eTransl ati on&gt;   &lt;data: AccessProfi l eTransl ati on&gt;     &lt;data: LanguageCode&gt;DEU&lt;/data: LanguageCode&gt;     &lt;data: Ti tle&gt;Admi ni strator Standardzugri ffsprofi l   &lt;/data: Ti tle&gt;     &lt;data: Descri pti on&gt;Vom System erzeugt   &lt;/data: Descri pti on&gt;   &lt;/data: AccessProfi l eTransl ati on&gt; &lt;/data: Li stOfAccessProfi l eTransl ati on&gt; </pre> | <p>This section indicates the title and description that are displayed for the language specified by the language code. See <a href="#">“Language Codes and Their Corresponding Language and Country” on page 279</a> for more details.</p> <p>In this example, when the user's language is set to German (DEU) in the access profile:</p> <ul style="list-style-type: none"> <li>■ The title is displayed as follows:<br/><i>Administrator Standardzugriffsprofil</i></li> <li>■ The description is displayed as follows:<br/><i>Vom System erzeugt</i></li> </ul>  |
| <pre> &lt;data: Li stOfAccessProfi l eEntry&gt;   &lt;data: AccessProfi l eEntry&gt;     &lt;data: AccessObj ectName&gt;CustomObj ect10   &lt;/data: AccessObj ectName&gt;     &lt;data: Permi ssi onCode&gt;R&lt;/data: Permi ssi onCode&gt;   &lt;/data: AccessProfi l eEntry&gt; &lt;/data: Li stOfAccessProfi l eEntry&gt; </pre>   | <p>This section describes the access rights defined on the access profile for the object or the object's related information, including the permission code. The permission code is the code corresponding to the access level for an object, for example, R, RU, CRUD and so on.</p> <p>For information about the access object names that appear in the &lt;AccessObjectName&gt; elements in the XML, and their associated display names in the user interface, see <a href="#">“Access Objects and Corresponding Display Names” on page 281</a>.</p> <p>For information about the access permissions that are available for the access objects, see <a href="#">“Access Levels and Corresponding Permission Codes in the XML File” on page 384</a>.</p> |

# Migrating Access Profiles

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with access profiles:

- [“Extracting a Single Access Profile” on page 128](#)
- [“Extracting a Single Access Profile by System Name Using a Template File” on page 129](#)
- [“Extracting All Access Profiles” on page 130](#)
- [“Extracting All Access Profiles to a Specific Location” on page 130](#)
- [“Updating or Inserting an Access Profile \(Upsert\)” on page 131](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting a Single Access Profile

This topic describes how to extract a single access profile from your Oracle CRM On Demand server for your environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific access profile:

```
mi gration tool -u UserID -s ServerURL Read AccessProfile SystemNameOfAccessProfile
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfAccessProfile* is the system name of the access profile that you want to extract, for example, Administrator Default Access Profile.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Access Profile

The following is an example of extracting a specific access profile: Administrator Default Access Profile:

```
mi gration tool -u UserID -s ServerURL Read AccessProfile "Administrator Default Access Profile"
```

**NOTE:** Quotation marks are required only if the access profile name contains spaces.



## Extracting a Single Access Profile by System Name Using a Template File

This topic describes how to extract a single access profile from your Oracle CRM On Demand server for your environment (customer test environment or production) by system name, using a template file.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific access profile by system name, using an access profile input file that is derived from the access profile template file:

```
mi gration tool -u UserID -s ServerURL Read AccessProfile AccessProfileTemplateXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *AccessProfileTemplateXML* is an XML file that is derived from the default access profile template file on your computer. The default access profile template (AccessProfile.xml) is located in the *install\_path\resources\template* directory, for example:

```
C:\Oracle Migration Tool On Demand\resources\template
```

**NOTE:** Do not modify the default template file. If the template file is modified, then a Read operation extracts only the access profile specified in the template file, bypassing what is provided on the command line. Instead, modify a copy of the default access profile.

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Access Profile by System Name Using a Template File

The following is an example of extracting a specific access profile by system name using a template file. In this example, before you run the Oracle Migration Tool On Demand client, make a copy of the default file, AccessProfile.xml, and in the copy, add the system name of the access profile between the tags:

```
<data: Name> </data: Name>
```

For example: <data: Name>Administrator Default Access Profile</data: Name>

```
mi gration tool -u UserID -s ServerURL Read AccessProfile "C:\Oracle Migration Tool On Demand\resources\template\MyAccessProfile.xml"
```

By default, the template files are stored in the following directory:

```
path of Oracle Migration Tool\resources\template
```

Also, quotation marks are required only if the name contains spaces. If quotation marks are not surrounding the name, then the Oracle Migration Tool On Demand client uses the first value and bypasses the remaining values. For example, if you have two access profiles called *Admin* and *Admin Access Profile*, and you send the following request (without quotation marks), then the Oracle Migration Tool On Demand client extracts the *Admin* access profile, because no quotation marks are used. Oracle Migration Tool On Demand client uses the first value (*Admin*) and bypasses the rest (*Access Profile*):

```
mi grati ontool -u UserID -s ServerURL Read AccessProfile Admin Access Profile
```

## Extracting All Access Profiles

This topic describes how to extract all access profiles from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all access profiles:

```
mi grati ontool -u UserID -s ServerURL ReadAll AccessProfile
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Access Profiles

The following is an example of extracting all access profiles from your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAll AccessProfile
```

## Extracting All Access Profiles to a Specific Location

This topic describes how to extract all access profiles from your Oracle CRM On Demand environment (customer test environment or production) to a specific location.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all access profiles to a specific location:

```
mi grationtool -u UserID -s ServerURL ReadAll AccessProfile FolderLocation
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *FolderLocation* is the directory path to the folder where the extracted access profiles are stored, for example:

```
C: \MyAccessProfiles
```

**NOTE:** If you do not specify the drive letter, then the folder is created at the root of the directory where the Oracle Migration Tool On Demand client is installed.

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Access Profiles to a Specific Location

The following is an example of extracting all access profiles from your Oracle CRM On Demand server to a specific folder:

```
mi grationtool -u UserID -s ServerURL ReadAll AccessProfile "C: \MyAccessProfiles"
```

## Updating or Inserting an Access Profile (Upsert)

This topic describes how to update a specific access profile (if it exists), or insert that access profile (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production). For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*. This operation is specified using the Upsert command.

An update to an access profile is derived from the access profile system name. That is, if you run an Upsert operation on an access profile where the access profile system name in the XML file is *My Access Profile*, and an access profile of the same name exists in the target company, then the target access profile is updated. If the access profile does not exist on the target company, then the access profile is inserted on the target. The matching of the access profile name is also case sensitive. For example, if the access profile system name in the XML file is *MY Access Profile* and the target access profile is *My Access Profile* (no uppercase *Y*), then the *MY Access Profile* access profile is inserted in the target.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific access profile (if it exists) or insert the access profile (if it does not exist):

```
mi grationtool -u UserID -s ServerURL Upsert AccessProfile AccessProfileXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *AccessProfileXML* is the fully qualified path name of the access profile XML file, for example:  
C:\My Files\My Profile.xml

The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting an Access Profile

The following is an example of updating a specific access profile (if it exists) or inserting that access profile (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert AccessProfile "C:\My Files\My Profile.xml"
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.

# 17 Migrating Page Layouts

This chapter describes how to migrate page layouts using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Page Layouts on page 133](#)
- [Privileges Required for Migrating Page Layouts on page 134](#)
- [Elements and Sections in the Page Layout Field Information XML Output File on page 135](#)
- [Elements and Sections in the Page Layout Related Information XML Output File on page 137](#)
- [Elements and Sections in the Page Layout Section XML Output File on page 139](#)
- [Migrating Page Layout Field Information on page 141](#)
- [Migrating Page Layout Related Information on page 142](#)
- [Migrating Page Layout Section Information on page 144](#)

## Page Layouts

A *page layout* defines the appearance of pages, such as the Edit, Detail, or Create pages for Oracle CRM On Demand records by hiding or adding sections or fields to the page. Page layouts can be one of the following:

- **Static.** Indicates that specific fields are defined by role. This chapter applies only to static page layouts.
- **Dynamic.** Indicates that the page layouts 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.
- For more information about dynamic layouts, see [“Migrating Dynamic Page Layouts” on page 147](#).

[Table 42](#) describes the Oracle Migration Tool On Demand client commands used with page layouts. For more information about running these commands, see [“Migrating Page Layout Field Information” on page 141](#).

Table 42. Commands Used with Page Layouts in Oracle Migration Tool On Demand

| Command                 | Description   |
|-------------------------|---|
| ReadAll PageLayoutField | This command exports all field setup and field layout information for page layouts, as defined in Step 2 and Step 3 of the Oracle CRM On Demand Page Layout Wizard. |

Table 42. Commands Used with Page Layouts in Oracle Migration Tool On Demand

| Command  | Description  |
|--|--|
| ReadAll PageLayoutRelatedInformation                               | This command exports all related information for page layouts, as defined in Step 4 and Step 5 of the Page Layout Wizard.                          |
| ReadAll PageLayoutSection  | This command exports all section setup and layout information for page layouts.  |
| Upsert PageLayoutField<br><i>PageLayoutFieldXML</i>                | This command updates or inserts field setup and field layout information for page layouts. The page layout is derived from an XML file definition. |
| Upsert PageLayoutRelatedInformation<br><i>PageLayoutRelatedXML</i> | This command updates or inserts page layout related information. The page layout is derived from an XML file definition.                           |
| Upsert PageLayoutSection<br><i>PageLayoutSectionXML</i>            | This command updates or inserts page layout section information. The page layout is derived from an XML file definition.                           |

**NOTE:** Nonadministrative Oracle CRM On Demand users can run the ReadAll command for PageLayoutField, PageLayoutRelatedInformation, and PageLayoutSection.

## Privileges Required for Migrating Page Layouts

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the ReadAll command: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access and Customize Application.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

# Elements and Sections in the Page Layout Field Information XML Output File

Table 43 describes the elements and sections in the page layout field information XML output file.

Table 43. Elements and Sections in the Page Layout Field Information XML File

| Element or Section   | Description  |
|--|--|
| <code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>  | This element contains the system name of the object to which the page layout refers.   |
| <code>&lt;data:LayoutName&gt;My Custom Account Page Layout&lt;/data:LayoutName&gt;</code>  | This element contains the name of the page layout.   |
| <code>&lt;data:Description&gt;My Custom Account Page Layout Description&lt;/data:Description&gt;</code>  | This element contains the description of the page layout.  |
| <code>&lt;data:ListOfPageLayoutField&gt;         &lt;data:PageLayoutField&gt;           &lt;data:FieldName&gt;Name&lt;/data:FieldName&gt;           &lt;data:ReadOnly&gt;false&lt;/data:ReadOnly&gt;           &lt;data:Required&gt;true&lt;/data:Required&gt;           &lt;data:Section&gt;0&lt;/data:Section&gt;           &lt;data:Column&gt;0&lt;/data:Column&gt;           &lt;data:Row&gt;0&lt;/data:Row&gt;         &lt;/data:PageLayoutField&gt;       &lt;/data:ListOfPageLayoutField&gt;</code> | This section contains the field layout information. For more information, see <a href="#">“Example of the Values for Page Layout Field Information”</a> on page 136. |

## Example of the Values for Page Layout Field Information

Figure 2 is a screen capture displaying the section, column, and row values that the XML output generates for the page layout field information.

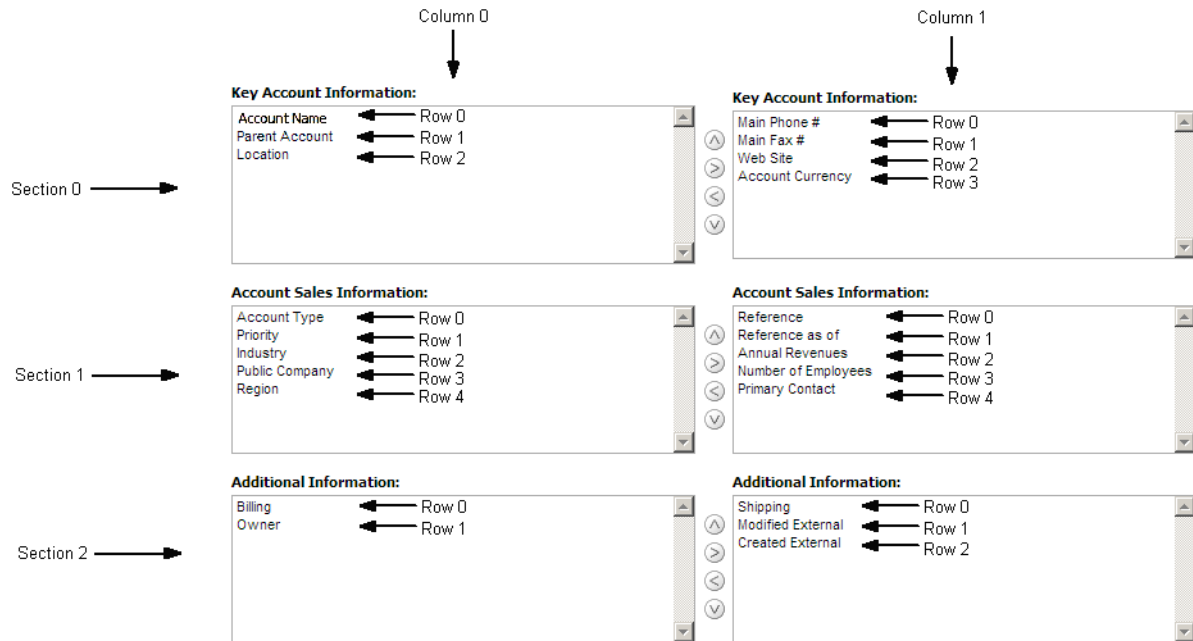


Figure 2. Example of the Values for the Page Layout Field Information

The UI Name might not match the value contained in the `<FieldName>` element. Use the section, column, and row values provided in the XML file to appropriately determine the value that it represents in the UI. For example, consider the following portion of the XML output, which is based on the configuration in Figure 2:

```
<data: PageLayoutField>
  <data: FieldName>Type</data: FieldName>
  <data: ReadOnly>false</data: ReadOnly>
  <data: Required>false</data: Required>
  <data: Section>1</data: Section>
  <data: Column>0</data: Column>
  <data: Row>0</data: Row>
</data: PageLayoutField>
```

Using Figure 2 and the values for the `<Section>`, `<Column>`, and `<Row>` elements in the XML code, you can observe that `<FieldName>Type</FieldName>` corresponds to the UI value of Account Type in the Account Sales Information section.



# Elements and Sections in the Page Layout Related Information XML Output File

Table 44 describes the elements and sections in the page layout related information XML output file.

Table 44. Elements and Sections in the Page Layout Related Information XML File

| Element or Section  | Description  |
|---|--|
| <code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>   | This element contains the system name of the object to which the page layout refers.   |
| <code>&lt;data:LayoutName&gt;My Custom Account Page Layout&lt;/data:LayoutName&gt;</code>   | This element contains the name of the page layout.   |
| <code>&lt;data:ListOfPageRelatedInformation&gt;<br/>&lt;data:PageRelatedInformation&gt;<br/>&lt;data:Name&gt;CRMODLS_BPL_ACNT.ChildList&lt;/data:Name&gt;<br/>&lt;data:Availability&gt;-1&lt;/data:Availability&gt;<br/>&lt;data:RelatedInformationLayout&gt;<br/>&lt;/data:RelatedInformationLayout&gt;<br/>&lt;/data:PageRelatedInformation&gt;<br/>&lt;/data:ListOfPageRelatedInformation&gt;</code> | <p>This section contains the information for the Related Information section:</p> <ul style="list-style-type: none"> <li>■ The Availability value of -1 corresponds to the Not Available Information section of the UI.</li> <li>■ The Availability value of 0 corresponds to the Available Information section of the UI.</li> <li>■ The Availability value of 1 corresponds to the Displayed Information section of the UI.</li> </ul> <p><a href="#">Table 90 on page 457</a> maps the values of the <code>&lt;Name&gt;</code> tag in the XML file to the name in the UI.</p> |

## Example of the Values for Page Layout Related Information

Figure 3 on page 138 is a screen capture displaying the availability information that the XML output generates for page layout related information. It lists three levels of availability:

- Not Available Information
- Available Information
- Displayed Information

The Availability values displayed in the example are explained in the description of the ListOfPageRelatedInformation section in [Table 44](#).

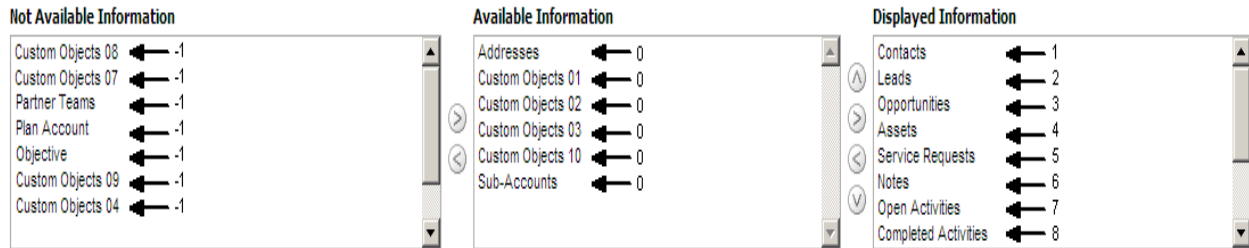


Figure 3. Example of the Values for Page Layout Related Information

## About the Displayed Information Section

The order of the sections in the XML file for the Displayed Information section (that is, if Availability is set to 1) determines the order that is displayed in the UI. This order applies to both the ReadAll and Upsert commands. [Figure 4 on page 139](#) displays how the order is implemented. In [Figure 4](#), in Example 1, the sections have the following order: Contacts, Leads, and then Opportunities. In Example 2, the sections have the following order: Opportunities, Contacts, and then Leads.

**Example 1**

```

<ns1:PageRelatedInformation>
  <ns1:Name>ContactPersonChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>LeadChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>OptyChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>

```

**Displayed Information**



**Example 2**

```

<ns1:PageRelatedInformation>
  <ns1:Name>OptyChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>ContactPersonChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>LeadChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>

```

**Displayed Information**



Figure 4. About the Displayed Information Section

# Elements and Sections in the Page Layout Section XML Output File

Table 45 describes the elements and sections in the page layout section XML output file.

Table 45. Elements and Sections in the Page Layout Section XML File

| Element or Section                                     | Description  |
|--|--|
| <data:ObjectName>Account</data:ObjectName>             | This element contains the system name of the object to which the page layout refers. |
| <data:LayoutName>myPageAccountLayout</data:LayoutName> | This element contains the name of the page layout.                                   |

Table 45. Elements and Sections in the Page Layout Section XML File

| Element or Section  | Description  |
|---|--|
| <pre> &lt;data: ListOfPageFormSection&gt;   &lt;data: PageFormSection&gt;     &lt;data: SectionSequence&gt;3&lt;/data: SectionSequence&gt;     &lt;data: ListOfFormSectionTranslation&gt;       &lt;data: FormSectionTranslation&gt;         &lt;data: Language&gt;ENU&lt;/data: Language&gt;         &lt;data: DisplayName&gt; Account PartnerInformation:         &lt;/data: DisplayName&gt;       &lt;/data: FormSectionTranslation&gt;     &lt;/data: ListOfFormSectionTranslation&gt;   &lt;/data: PageFormSection&gt; &lt;/data: ListOfPageFormSection&gt; </pre> | <p>This section contains the Page Layout Section information. For more information, see <a href="#">“Example of the Values for Page Layout Section” on page 140.</a></p> |

### Example of the Values for Page Layout Section

In a page layout section XML file, the <SectionSequence> element represents the location of the section relative to other sections in the page layout in the UI. The first section at the top of the page layout has a <SectionSequence> of 0 which increments by 1 as the sequence moves down the sections in the page layout.

For example, consider the following portion of the XML output, which is based on the configuration of the example page layout section in [Figure 5 on page 140](#):

```

<data: SectionSequence>2</data: SectionSequence>
<data: ListOfFormSectionTranslation>
<data: FormSectionTranslation>
<data: Language>ENU</data: Language>
<data: DisplayName>Additional Information: </data: DisplayName>
</data: FormSectionTranslation>
</data: ListOfFormSectionTranslation>

```

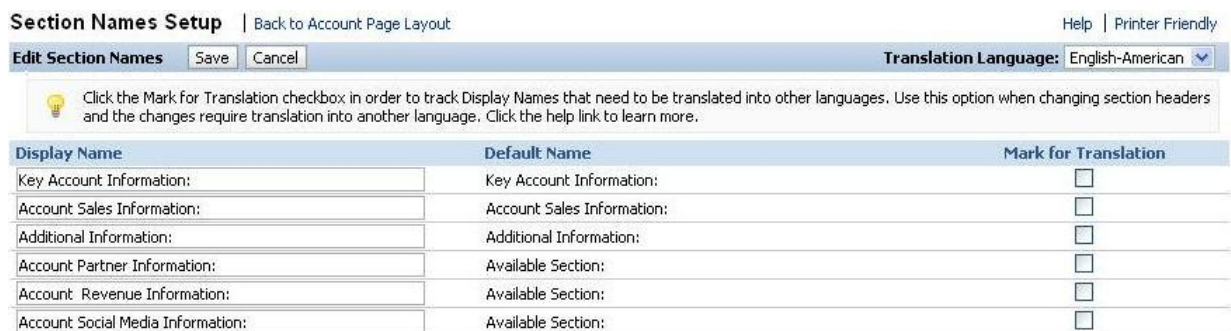


Figure 5. Example Page Layout Section

Because the <SectionSequence> element in the XML output is set to 2 for the *Additional Information:* section, [Figure 5](#) shows that *Additional Information:* is the third section in the user interface.

# Migrating Page Layout Field Information

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate page layout field information:

- [“Extracting All Page Layout Field Information” on page 141](#)
- [“Updating or Inserting Page Layout Field Information for a Single Object \(Upsert\)” on page 142](#)

When using the Oracle Migration Tool On Demand client to migrate page layout field information, observe that field management information takes precedence over page layout field information when a field is set as required or read-only through field management. For example, if the field management XML for an extract operation specifies a field as required, but the page layout XML for an extract operation specifies the field as not required, then the field is displayed as required in the page layout in the Oracle CRM On Demand UI after migrating this information. To completely extract and migrate a company's field management information, you must extract and migrate both the field management and page layout information. For more information about extracting and migrating field management information, see [Chapter 5, “Migrating Custom Fields.”](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting All Page Layout Field Information

This topic describes how to extract all page layout field information from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all page layout field information:

```
mi grati ontool -u UserID -s ServerURL ReadAll PageLayoutField
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Page Layout Field Information

The following is an example of extracting all page layout field information from your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAll PageLayoutField
```

## Updating or Inserting Page Layout Field Information for a Single Object (Upsert)

This topic describes how to update page layout field information for a single object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update page layout field information for a single object (if it exists) or insert this information (if it does not exist):

```
migrationtool -u UserID -s ServerURL Upsert PageLayoutField PageLayoutFieldXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *PageLayoutFieldXML* is the fully qualified path name of the page layout field information XML file for a single object such as Account, for example:

```
C:\My Files\PageLayoutFieldInformation\Account.xml
```

### Example of Updating or Inserting Page Layout Field Information for a Single Object

The following is an example of updating page layout field information for a single object such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert PageLayoutField "C:\My Files\PageLayoutFieldInformation\Account.xml"
```

**NOTE:** Quotation marks are required only if the name contains spaces.

## Migrating Page Layout Related Information

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate page layout related information:

- [“Extracting All Page Layout Related Information” on page 143](#)
- [“Updating or Inserting Page Layout Related Information for a Single Object \(Upsert\)” on page 143](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting All Page Layout Related Information

This topic describes how to extract all page layout related information from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all page layout related information:

```
mi grati ontool -u UserID -s ServerURL ReadAll PageLayoutRelatedInformation
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Page Layout Related Information

The following is an example of extracting all page layout related information from your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAll PageLayoutRelatedInformation
```

## Updating or Inserting Page Layout Related Information for a Single Object (Upsert)

This topic describes how to update page layout related information for a single object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update page layout related information for a single object (if it exists) or insert this information (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert PageLayoutRelatedInformation  
PageLayoutRelatedXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *PageLayoutRelatedXML* is the fully qualified path name of the page layout related information XML file for a single object, such as Account, for example:

C:\My Files\PageLayoutRelatedInformation\Account.xml

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting Page Layout Related Information for a Single Object

The following is an example of updating the page layout related information for a single object, such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert PageLayoutRelatedInformation "C:\My Files\PageLayoutRelatedInformation\Account.xml "
```

**NOTE:** Quotation marks are required only if the name contains spaces.

## Migrating Page Layout Section Information

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate page layout section information:

- [“Extracting All Page Layout Section Information” on page 144](#)
- [“Updating or Inserting Page Layout Section Information for a Single Object \(Upsert\)”](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting All Page Layout Section Information

This topic describes how to extract all page layout section information from your Oracle CRM On Demand environment (customer test environment or production).

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all page layout section information:

```
migrationtool -u UserID -s ServerURL ReadAll PageLayoutSection
```

where:



- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting All Page Layout Section Information

The following is an example of extracting all page layout section information from your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAl l PageLayoutSecti on
```

## Updating or Inserting Page Layout Section Information for a Single Object (Upsert)

This topic describes how to update page layout section information for a single object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update page layout section information for a single object (if it exists) or insert this information (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert PageLayoutSecti on PageLayoutSecti onXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *PageLayoutSectionXML* is the fully qualified path name of the page layout section information XML file for a single object, such as Account, for example:

```
C: \My Fi l es\PageLayoutSecti on\Account\AccountPageLayoutSecti on. xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting Page Layout Section Information for a Single Object

The following is an example of updating the page layout section information for a single object, such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert PageLayoutSection "C:\MyFiles\PageLayoutSection\Account\AccountPageLayoutSection.xml"
```

**NOTE:** Quotation marks are required only if the name contains spaces.

# 18 Migrating Dynamic Page Layouts

This chapter describes how to migrate dynamic page layouts using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Dynamic Page Layouts on page 147](#)
- [Privileges Required for Migrating Dynamic Page Layouts on page 147](#)
- [Elements and Sections in the Dynamic Page Layout XML Output File on page 148](#)
- [Migrating Dynamic Page Layouts on page 149](#)

## Dynamic Page Layouts

*Dynamic page 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.

[Table 46](#) describes the Oracle Migration Tool On Demand client commands used with dynamic page layouts. For more information about running these commands, see [“Migrating Dynamic Page Layouts” on page 149](#).

Table 46. Commands Used with Dynamic Page Layouts in Oracle Migration Tool On Demand

| Command   | Description  |
|---|--|
| Read DynamicLayout<br><i>SystemNameOfObject</i> | This command extracts the configuration data for the dynamic page layouts for a specific record type (object).<br><br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> . |
| ReadAllDynamicLayout                            | This command extracts the configuration data for the dynamic page layouts for all objects.   |
| UpsertDynamicLayout<br><i>DynamicLayoutXML</i>  | This command updates or inserts a dynamic page layout, as required.  |

## Privileges Required for Migrating Dynamic Page Layouts

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll command: Enable Web Services Access.
- For the Upsert command: Enable Web Services Access and Customize Application - Manage Dynamic Layout.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Dynamic Page Layout XML Output File

Table 47 describes the elements and sections in the dynamic page layout XML output file.

Table 47. Elements and Sections in the Dynamic Page Layout XML File

| Element or Section  | Description  |
|---|--|
| <code>&lt;data:ObjectName&gt;Opportunity&lt;/data:ObjectName&gt;</code>   | This element contains the system name of the object to which the dynamic page layout refers.   |
| <code>&lt;data:DrivingPicklist&gt;Sales Type&lt;/data:DrivingPicklist&gt;</code>  | This element contains the name of the dynamic page layout driving picklist. For more information about driving picklists, see <i>Oracle CRM On Demand Online Help</i> .  |
| <code>&lt;data:ListOfDynamicLayouts&gt;<br/>&lt;data:DynamicLayout&gt;<br/>&lt;data:Name&gt;dynamic&lt;/data:Name&gt;<br/>&lt;data:DefaultLayout&gt;Opportunity Page Standard Layout&lt;/data:DefaultLayout&gt;<br/>&lt;data:ModifiedBy&gt;sales10&lt;/data:ModifiedBy&gt;<br/>&lt;data:Description&gt;Dynamic Layout Description&lt;/data:Description&gt;<br/>&lt;data:ListOfPicklistValueMapping&gt;<br/>&lt;data:DrivingPicklist&gt;<br/>&lt;data:Value&gt;New Business&lt;/data:Value&gt;<br/>&lt;data:AssignedLayout&gt;test2&lt;/data:AssignedLayout&gt;<br/>&lt;/data:DrivingPicklist&gt;<br/>&lt;/data:ListOfPicklistValueMapping&gt;<br/>&lt;/data:DynamicLayout&gt;<br/>&lt;/data:ListOfDynamicLayouts&gt;</code> | <p>This section contains information about the dynamic page layout.</p> <ul style="list-style-type: none"> <li>■ <code>&lt;Name&gt;</code> contains the name of the dynamic page layout.</li> <li>■ <code>&lt;DefaultLayout&gt;</code> contains the name of the default dynamic page layout with which driving picklist values are associated.</li> <li>■ <code>&lt;ModifiedBy&gt;</code> contains the name of the user who last updated the dynamic page layout.</li> <li>■ <code>&lt;Description&gt;</code> contains the description of the dynamic page layout.</li> <li>■ <code>&lt;ListOfPicklistValueMapping&gt;</code> contains the mappings of driving picklist values to dynamic page layouts.</li> <li>■ <code>&lt;Value&gt;</code> contains the driving picklist value.</li> <li>■ <code>&lt;AssignedLayout&gt;</code> contains the dynamic page layout that is displayed when the driving picklist value is selected.</li> </ul> |

# Migrating Dynamic Page Layouts

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate dynamic page layout field information:

- [“Extracting Dynamic Page Layouts for a Single Object”](#)
- [“Extracting Dynamic Page Layouts for All Objects” on page 149](#)
- [“Updating or Inserting Dynamic Page Layouts \(Upsert\)” on page 150](#)

## Extracting Dynamic Page Layouts for a Single Object

This topic describes how to extract the dynamic page layouts for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

**NOTE:** Users require the `Enable Web Services Access` privilege to run the `Read` command.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the dynamic page layouts for a single object:

```
mi grati ontool -u UserID -s ServerURL Read Dynami cLayout SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to read a set of dynamic page layouts, for example, `Account`. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting Dynamic Page Layouts for a Single Object

The following is an example of extracting the dynamic page layouts for the `Opportunity` record type:

```
mi grati ontool -u UserID -s ServerURL Read Dynami cLayout Opportuni ty
```

## Extracting Dynamic Page Layouts for All Objects

This topic describes how to extract all dynamic page layouts from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all dynamic page layouts:

```
mi grati ontool -u UserID -s ServerURL ReadAll Dynami cLayout
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Dynamic Page Layouts for All Objects

The following is an example of extracting all dynamic page layouts from your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAll Dynami cLayout
```

## Updating or Inserting Dynamic Page Layouts (Upsert)

This topic describes how to update dynamic page layout information for a single object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update dynamic page layout information (if it exists) for a single object or insert this information (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert Dynami cLayout Dynami cLayoutXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *DynamicLayoutXML* is the fully qualified path name of the dynamic page layout XML file, for example:

```
C:\My Files\Dynami cLayout.xml
```

### Example of Updating or Inserting a Dynamic Page Layout

The following is an example of updating a dynamic page layout (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert DynamicLayout "C:\MyFiles\DynamicLayout.xml"
```

**NOTE:** Quotation marks are required only if the name contains spaces.





# 19 Migrating Search Layouts

This chapter describes how to migrate custom search layouts using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Search Layouts on page 153](#)
- [Privileges Required for Migrating Search Layouts on page 154](#)
- [Elements and Sections in the Search Layout XML Output File on page 154](#)
- [Migrating Search Layouts on page 159](#)

## Search Layouts

A *search layout* for a record type determines which fields users can search on when searching for records of that type, and also which fields are displayed in the search results page. Search layouts also determine some of the features in Lookup windows and whether smart associations are enabled. A default search layout is provided for each record type. For many record types, you can create multiple custom search layouts and assign them to user roles. For more information about search layouts, see *Oracle CRM On Demand Online Help*.

[Table 48](#) describes the Oracle Migration Tool On Demand client commands used with search layouts. These commands are case sensitive.

Table 48. Commands Used with Search Layouts in Oracle Migration Tool On Demand

| Command   | Description   |
|---|---|
| Read SearchLayout <i>SystemNameOfObject</i> [ <i>SearchLayoutName</i> ] | This command extracts all of the custom search layouts for a specific record type (object), or a single custom layout (if the <i>SearchLayoutName</i> parameter is specified). The parameters are as follows: <ul style="list-style-type: none"><li>■ <i>SystemNameOfObject</i> is the system name of a record type. The system names for the record types are listed in <a href="#">"System Names for Record Types" on page 411</a>.</li><li>■ <i>SearchLayoutName</i> is the name of a search layout. This parameter is optional.</li></ul> |
| ReadAll SearchLayout  | This command extracts all of the custom search layouts for all objects.   |
| Upsert SearchLayout <i>SearchLayoutXML</i>                              | This command updates or inserts a custom search layout.   |

# Privileges Required for Migrating Search Layouts

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access and Customize Application.
- For the Upsert command: Enable Web Services Access, Customize Application, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

# Elements and Sections in the Search Layout XML Output File

Table 49 describes the elements and sections in the search layout XML output file.

Table 49. Elements and Sections in the Search Layout XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: SearchLayout&gt; . . . &lt;/data: SearchLayout&gt;</pre>   | The <SearchLayout> section contains all of the information for a single search layout.  |
| <pre>&lt;data: SearchLayout&gt;   &lt;data: Obj ectName&gt;Account   &lt;/data: Obj ectName&gt; . . . &lt;/data: SearchLayout&gt;</pre>                         | <ObjectName> contains the system name of the record type (object), which never changes. |
| <pre>&lt;data: SearchLayout&gt; . . .   &lt;data: LayoutName&gt;TestLayout   &lt;/data: LayoutName&gt; . . . &lt;/data: SearchLayout&gt;</pre>                  | <LayoutName> contains the name of the layout.   |
| <pre>&lt;data: SearchLayout&gt; . . .   &lt;data: LastUpdatedBy&gt;10/17/2012 12: 41: 05   &lt;/data: LastUpdatedBy&gt; . . . &lt;/data: SearchLayout&gt;</pre> | <LastUpdatedBy> contains the date and time the layout was last updated.                 |
| <pre>&lt;data: SearchLayout&gt;   &lt;data: Descri ption&gt;This i s a test l ayout.   &lt;/data: Descri ption&gt; . . . &lt;/data: SearchLayout&gt;</pre>      | <Description> contains the description for the layout.                                  |

Table 49. Elements and Sections in the Search Layout XML File

| Element or Section  | Description  |
|---|--|
| <pre> &lt;data: SearchLayout&gt; . . .   &lt;data: ListOfSpecifySearchFields&gt;     &lt;data: SearchLayoutField&gt;       &lt;data: FieldName&gt;Name_Shadow       &lt;/data: FieldName&gt;       &lt;data: SearchOptimization&gt;2       &lt;/data: SearchOptimization&gt;       &lt;data: Section&gt;1&lt;/data: Section&gt;       &lt;data: Order&gt;0&lt;/data: Order&gt;     &lt;/data: SearchLayoutField&gt;     . . .   &lt;/data: ListOfSpecifySearchFields&gt; . . . &lt;/data: SearchLayout&gt; </pre> | <p>The &lt;ListOfSpecifySearchFields&gt; section contains the details of the search fields for the layout. For each field, the &lt;SearchLayoutField&gt; section includes the following elements:</p> <ul style="list-style-type: none"> <li>■ &lt;FieldName&gt; contains the system name of the field, which never changes.</li> <li>■ &lt;SearchOptimization&gt; indicates whether the field is optimized for fast search and whether it can be case insensitive in a search. For more information about this element, see <a href="#">“About the SearchOptimization Element” on page 159</a>.</li> <li>■ &lt;Section&gt; indicates which section of the search field layout the field appears in, as follows: <ul style="list-style-type: none"> <li>■ A value of 0 indicates that the field appears in the Not Available Search Fields section.</li> <li>■ A value of 1 indicates that the field appears in the Targeted Search Fields section.</li> <li>■ A value of 2 indicates that the field appears in the Additional Search Fields section.</li> </ul> </li> <li>■ The &lt;Order&gt; element indicates the position of the field within the section of the search layout. In the Targeted Search Fields section and the Additional Search Fields section, the fields are numbered consecutively within the section. The first field in each section is numbered 0, the second field is numbered 1, and so on. All of the fields in the Not Available Search Fields section have their order number set to -1.</li> </ul> |

Table 49. Elements and Sections in the Search Layout XML File

| Element or Section  | Description   |
|---|---|
| <pre> &lt;data: SearchLayout&gt;   . . .   &lt;data: ListOfDefineSearchResultsLayout&gt;     &lt;data: SearchLayoutField&gt;       &lt;data: FieldName&gt;Name_Shadow       &lt;/data: FieldName&gt;       &lt;data: SearchOptimization&gt;2       &lt;/data: SearchOptimization&gt;       &lt;data: Section&gt;1&lt;/data: Section&gt;       &lt;data: Order&gt;0&lt;/data: Order&gt;     &lt;/data: SearchLayoutField&gt;   &lt;/data: ListOfDefineSearchResultsLayout&gt;   . . . &lt;/data: SearchLayout&gt;           </pre> | <p>The &lt;ListOfDefineSearchResultsLayout&gt; section contains the details of the search result fields for the layout. For each field, the &lt;SearchLayoutField&gt; section includes the following elements:</p> <ul style="list-style-type: none"> <li>■ &lt;FieldName&gt; is the name of the field.</li> <li>■ &lt;SearchOptimization&gt; indicates whether the field is optimized for fast search and whether it can be case insensitive in a search. For more information about this element, see <a href="#">“About the SearchOptimization Element” on page 159</a>.</li> <li>■ &lt;Section&gt; indicates which section of the search results layout the field appears in, as follows:               <ul style="list-style-type: none"> <li>■ A value of 0 indicates that the field appears in the Not Available Search Results Fields section.</li> <li>■ A value of 1 indicates that the field appears in the Lookup Window Search Results Fields section.</li> <li>■ A value of 2 indicates that the field appears in the Additional Search Results Fields section.</li> </ul> </li> <li>■ The &lt;Order&gt; element indicates the position of the field within the list of fields. In the Lookup Window Search Results Fields section and the Additional Search Results Fields section, the fields are numbered consecutively within the section. The first field in each section is numbered 0, the second field is numbered 1, and so on. All of the fields in the Not Available Search Results Fields section have their order number set to -1.</li> </ul> |

Table 49. Elements and Sections in the Search Layout XML File

| Element or Section   | Description   |
|--|---|
| <pre> &lt;data: SearchLayout&gt; . . .   &lt;data: EnableDivisionAsDefaultSearchField&gt; false   &lt;/data: EnableDivisionAsDefaultSearchField&gt; . . . &lt;/data: SearchLayout&gt; </pre> | <p>The &lt;EnableDivisionAsDefaultSearchField&gt; element corresponds to the Configure Lookup Window with Division as the Default Search Field check box in the UI. This element is applicable for search layouts for the Product record type only.</p> <p>If this element is set to true, then the Division field is the default search field and it is prepopulated with the user's primary division.</p> <p>If this element is set to false, then the Product Name field is the default search field, unless the &lt;EnableFirstTargetedFieldAsLookupDefault&gt; element is set to true, in which case the first field in the list of targeted search fields in the search layout is used as the default search field.</p> |
| <pre> &lt;data: SearchLayout&gt; . . .   &lt;data: EnableDefaultFields&gt;true   &lt;/data: EnableDefaultFields&gt; . . . &lt;/data: SearchLayout&gt; </pre>                                 | <p>The &lt;EnableDefaultFields&gt; element corresponds to the Configure Lookup Window With Default Fields check box in the UI. It determines which fields appear in the search results in the Lookup windows for the record type, as follows:</p> <ul style="list-style-type: none"> <li>■ If this element is set to true, then a predefined set of fields is displayed in the search results in the Lookup windows for the record type.</li> <li>■ If this element is set to false, then the fields that are configured as the search fields for the Lookup window are also displayed in the search results in the Lookup window.</li> </ul>   |
| <pre> &lt;data: SearchLayout&gt; . . .   &lt;data: EnableDefaultSearchResults&gt;true   &lt;/data: EnableDefaultSearchResults&gt; . . . &lt;/data: SearchLayout&gt; </pre>                   | <p>The &lt;EnableDefaultSearchResults&gt; element corresponds to the Show Search Results When Lookup Window Opens check box in the UI. It determines whether a list of available records is displayed in the Lookup window when it opens (true), or no records are displayed when the Lookup window opens (false).</p>  |

Table 49. Elements and Sections in the Search Layout XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: SearchLayout&gt; . . .   &lt;data: EnableAutoResolve&gt;true   &lt;/data: EnableAutoResolve&gt; . . . &lt;/data: SearchLayout&gt;</pre>                             | <p>The &lt;EnableAutoResolve&gt; element corresponds to the Auto-Resolve Enabled check box in the UI. It determines whether smart associations are enabled (true) or are not enabled (false). Smart associations are automatic searches that make it easier for users to associate records of different record types, such as account, contact, opportunity, activity, and so on with each other. For more information about smart associations, see <i>Oracle CRM On Demand Online Help</i>.</p>   |
| <pre>&lt;data: SearchLayout&gt; . . .   &lt;data: EnableDefaultCtxSensitiveList&gt;   false   &lt;/data: EnableDefaultCtxSensitiveList&gt; . . . &lt;/data: SearchLayout&gt;</pre> | <p>The &lt;EnableDefaultCtxSensitiveList&gt; element corresponds to the Show Context-Sensitive List as Lookup Window Default check box in the UI. It determines whether any available context-sensitive lists appear before the other lists in the record-type List field in the upper-left corner of Lookup windows (true), or appear after the system lists (false).</p> <p><b>NOTE:</b> This check box is effective only if the Show Context-Sensitive List as Lookup Window Default option is set to Enabled on the company profile.</p>  |
| <pre>&lt;data: SearchLayout&gt; . . .   &lt;data: EnableKeywordSearch&gt;false   &lt;/data: EnableKeywordSearch&gt; . . . &lt;/data: SearchLayout&gt;</pre>                        | <p>The &lt;EnableKeywordSearch&gt; element corresponds to the Configure Enhanced Keyword Search with Selected Search Results Fields check box in the UI. It determines which fields appear in the search results when an enhanced keyword search is performed for the record type, as follows:</p> <ul style="list-style-type: none"> <li>■ If this element is set to true, then the fields that are configured as the search fields for the Lookup window are also displayed in the results of an enhanced keyword search.</li> <li>■ If this element is set to false, then a predefined set of fields is displayed in the results of an enhanced keyword search.</li> </ul> |

Table 49. Elements and Sections in the Search Layout XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: SearchLayout&gt; . . .   &lt;data: EnableFirstTargetedFieldAsLookupDefault&gt;false   &lt;/data: EnableFirstTargetedFieldAsLookupDefault&gt; . . . &lt;/data: SearchLayout&gt;</pre> | <p>The &lt;EnableFirstTargetedFieldAsLookupDefault&gt; element corresponds to the First Targeted Search Field as Default Search in Lookups check box in the UI. It determines whether the first field in the list of targeted search fields in the search layout is used as the default search field in the Quick Filter in the Lookup window (true), or the preconfigured default search field is used (false).</p> <p><b>NOTE:</b> For the Product record type only, the setting in the &lt;EnableDivisionAsDefaultSearchField&gt; element takes precedence over the setting of the &lt;EnableFirstTargetedFieldAsLookupDefault&gt; element.</p> |

### About the SearchOptimization Element

The <SearchOptimization> element for a field in a search layout indicates whether the field is optimized for fast search and also whether the field can be made case insensitive by selecting the Case Insensitive check box in an advanced search or in the Refine List page for a list. The possible values are as follows:

- A value of -1 indicates that the field is not optimized for fast search and is always case sensitive, regardless of the setting in the Case Insensitive check box in a search. The names of these fields appear in the default text color in the search layout wizard.
- A value of 1 indicates that the field is optimized for fast search and is always case sensitive, even when the Case Insensitive check box is selected in a search. The names of these fields appear in green text in the search layout wizard.
- A value of 2 indicates that the field is optimized for fast search and becomes case insensitive when the Case Insensitive check box is selected in a search. The names of these fields appear in blue text in the search layout wizard.
- A value of 3 indicates that the field is not optimized for fast search and is always case insensitive, regardless of the setting in the Case Insensitive check box in a search. The names of these fields appear in purple text in the search layout wizard.

## Migrating Search Layouts

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate search layouts:

- [“Extracting a Single Search Layout” on page 160](#)

- [“Extracting All Search Layouts for a Single Object” on page 160](#)
- [“Extracting All Search Layouts for All Objects” on page 161](#)
- [“Updating or Inserting a Search Layout \(Upsert\)” on page 162](#)

## Extracting a Single Search Layout

This topic describes how to extract a single custom search layout from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follow:

```
migration tool install/repository/SearchLayout/RecordType/  
SearchLayoutName.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single search layout:

```
migrati ontool -u UserID -s ServerURL Read SearchLayout SystemNameOfObject  
SearchLayoutName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract the search layout, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).
- *SearchLayoutName* is the name of the search layout that you want to extract.

### Example of Extracting a Single Search Layout

The following is an example of extracting a single search layout:

```
migrati ontool -u UserID -s ServerURL Read SearchLayout Account "My Account Layout"
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the search layout name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Search Layouts for a Single Object

This topic describes how to extract all of the custom search layouts for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.



## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the search layouts for a single object:

```
mi grati ontool -u UserID -s ServerURL Read SearchLayout SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract the search layouts, for example, Account. The system names for the record types are listed in ["System Names for Record Types" on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting All Search Layouts for a Single Object

The following is an example of extracting all search layouts for a single object:

```
mi grati ontool -u UserID -s ServerURL Read SearchLayout Account
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Search Layouts for All Objects

This topic describes how to extract all of the custom search layouts for all objects from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the search layouts for all objects:

```
mi grati ontool -u UserID -s ServerURL ReadAll SearchLayout
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting a Search Layout (Upsert)

This topic describes how to update a search layout (if it exists) or insert a search layout (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The Upsert command inserts or updates search layouts based on the following user key:

- <LayoutName> and <ObjectName>

Oracle CRM On Demand attempts to locate the search layout specified in the input file based on the user key. If a match is located, then the search layout is updated. If Oracle CRM On Demand cannot locate a search layout based on the user key, then a new search layout is created for the specified record type.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update a search layout for an object:

```
mi grati ontool -u UserID -s ServerURL Upsert SearchLayout SearchLayoutXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SearchLayoutXML* is the fully qualified path name of the search layout XML file, for example:

```
C: \My Files\MyAccountSearchLayout. xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
mi grati ontool -u UserID -s ServerURL Upsert SearchLayout "C: \My Files\My Account Search Layout. xml "
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting a Search Layout

The following is an example of updating a search layout (if it exists) or inserting the search layout (if it does not exist) in your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL Upsert SearchLayout "C: \Oracl e Mi grati on Tool On Demand\reposit ory\SearchLayout\MyAccountSearchLayout. xml "
```

**NOTE:** Quotation marks are required only if the fully qualified path name contains spaces.

# 20 Migrating Roles

This chapter describes how to migrate roles using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Roles on page 163](#)
- [Privileges Required for Migrating Roles on page 163](#)
- [Elements and Sections in the Roles XML Output File on page 164](#)
- [Migrating Roles on page 167](#)

## Roles

A *role* in Oracle CRM On Demand is similar to a business function that a user performs within an organization, such as a sales executive function or a service manager function. Within your organization, your business function gives you certain privileges and permissions that are unique to your business function. Similarly, within the context of Oracle CRM On Demand, roles differentiate one business function from another by doing the following:

- Defining the features in Oracle CRM On Demand that a user has the privileges to use
- Defining the set of permissions the user is given to work with protected information
- Defining the user interface settings that display this information

[Table 50](#) describes the Oracle Migration Tool On Demand client commands used with roles. For more information about running these commands, see [“Migrating Roles” on page 167](#).

Table 50. Commands Used with Roles in Oracle Migration Tool On Demand

| Command             | Description  |
|---------------------|--|
| ReadAll Role        | This command exports all roles in the Oracle CRM On Demand tenant.   |
| Upsert Role RoleXML | This command updates or inserts a role.<br><b>NOTE:</b> For an update to occur, the criteria must match the value of the <RoleName> element, which is case sensitive. For example, Administrator and ADMINISTRATOR are two different values. |

## Privileges Required for Migrating Roles

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the ReadAll command: Enable Web Services Access, and Manage Roles and Access.
- For the Upsert command: Enable Web Services Access, and Manage Roles and Access.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Roles XML Output File

Table 51 describes the elements and sections in the roles XML output file.

Table 51. Elements and Sections in the Roles XML Output File

| Element or Section  | Description  |
|---|--|
| <code>&lt;data: RoleName&gt;Administrator&lt;/data: RoleName&gt;</code>   | This element contains the system name of the role.   |
| <code>&lt;data: Description&gt;OnDemand Role&lt;/data: Description&gt;</code>   | This element contains the description for the role.  |
| <code>&lt;data: DefaultSalesProcess&gt;Default Sales Process&lt;/data: DefaultSalesProcess&gt;</code>   | This element contains the default sales process defined for the role.  |
| <code>&lt;data: ThemeName&gt;Oracle&lt;/data: ThemeName&gt;</code>  | This element contains the name of the theme that is used by default when a user who is assigned this role signs in to Oracle CRM On Demand using a desktop or laptop computer.   |
| <code>&lt;data: ModernThemeName&gt;Oracle Blue - Modern&lt;/data: ModernThemeName&gt;</code>  | This element contains the name of the theme that is used by default when a user who is assigned this role signs 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. |
| <code>&lt;data: LeadConversionLayout&gt;&lt;/data: LeadConversionLayout&gt;</code>  | This element contains the lead conversion layout defined for the role.   |
| <code>&lt;data: ActionBarLayout&gt;Action Bar Standard Layout&lt;/data: ActionBarLayout&gt;</code>  | This element contains the Action bar layout defined for the role.  |
| <code>&lt;data: ListOfRoleTranslations&gt;<br/>&lt;data: RoleTranslation&gt;<br/>  &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt;<br/>  &lt;data: RoleName&gt;My Custom Role&lt;/data: RoleName&gt;<br/>&lt;/data: RoleTranslation&gt;<br/>&lt;/data: ListOfRoleTranslations&gt;</code> | This section contains the various translation values of the role.  |

Table 51. Elements and Sections in the Roles XML Output File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: ListOfRecordTypeAccess&gt;   &lt;data: RecordTypeAccess&gt;     &lt;data: RecordName&gt;CustomObject10&lt;/data: RecordName&gt;     &lt;data: HasAccess&gt;true&lt;/data: HasAccess&gt;     &lt;data: CanCreate&gt;true&lt;/data: CanCreate&gt;     &lt;data: CanReadAll&gt;true&lt;/data: CanReadAll&gt;   &lt;/data: RecordTypeAccess&gt;   &lt;data: RecordTypeAccess&gt;     &lt;data: RecordName&gt;Account&lt;/data: RecordName&gt;     &lt;data: HasAccess&gt;true&lt;/data: HasAccess&gt;     &lt;data: CanCreate&gt;true&lt;/data: CanCreate&gt;     &lt;data: CanReadAll&gt;true&lt;/data: CanReadAll&gt;   &lt;/data: RecordTypeAccess&gt; &lt;/data: ListOfRecordTypeAccess&gt;</pre>  | <p>This section lists the Record Type Access defined for each record type for the role. For more information about mapping the XML values from the &lt;RecordName&gt; elements to their corresponding UI names, see <a href="#">Table 87 on page 411</a>.</p>  |
| <pre>&lt;data: AccessProfile&gt;   &lt;data: DefaultAccessProfile&gt;Administrator Default   Access Profile&lt;/data: DefaultAccessProfile&gt;   &lt;data: OwnerAccessProfile&gt;Administrator Owner Access   Profile&lt;/data: OwnerAccessProfile&gt; &lt;/data: AccessProfile&gt;</pre>   | <p>This section contains the access profile that has been assigned to the role.</p>  |
| <pre>&lt;data: ListOfPrivilege&gt;   &lt;data: Privilege&gt;     &lt;data: PrivilegeName&gt;ACCESS_ATT_EXPORT     &lt;/data: PrivilegeName&gt;     &lt;data: Enabled&gt;false&lt;/data: Enabled&gt;   &lt;/data: Privilege&gt; &lt;/data: ListOfPrivilege&gt;</pre>   | <p>This section assigns the privileges to the role. For reference information about privilege IDs, their corresponding names, and descriptions, see <a href="#">“Privilege IDs and Their Corresponding Names and Descriptions” on page 441</a>.</p>  |
| <pre>&lt;data: TabAccessAndOrder&gt;   &lt;data: ListOfAvailableTab&gt;     &lt;data: AvailableTab&gt;Dashboard&lt;/data: AvailableTab&gt;     &lt;data: AvailableTab&gt;Forecasts&lt;/data: AvailableTab&gt;     &lt;data: AvailableTab&gt;Reports&lt;/data: AvailableTab&gt;   &lt;/data: ListOfAvailableTab&gt;   &lt;data: ListOfSelectedTab&gt;     &lt;data: SelectedTab&gt;       &lt;data: TabName&gt;Home&lt;/data: TabName&gt;       &lt;data: Order&gt;0&lt;/data: Order&gt;     &lt;/data: SelectedTab&gt;     &lt;data: SelectedTab&gt;       &lt;data: TabName&gt;Accounts&lt;/data: TabName&gt;       &lt;data: Order&gt;1&lt;/data: Order&gt;     &lt;/data: SelectedTab&gt;     &lt;data: SelectedTab&gt;       &lt;data: TabName&gt;Contacts&lt;/data: TabName&gt;       &lt;data: Order&gt;2&lt;/data: Order&gt;     &lt;/data: SelectedTab&gt;     &lt;data: SelectedTab&gt;       &lt;data: TabName&gt;Leads&lt;/data: TabName&gt;       &lt;data: Order&gt;3&lt;/data: Order&gt;     &lt;/data: SelectedTab&gt;   &lt;/data: ListOfSelectedTab&gt; &lt;/data: TabAccessAndOrder&gt;</pre> | <p>This section describes the tab access and order for the role.</p> <p>The &lt;ListOfAvailableTab&gt; section describes the tabs that correspond to the Available Tabs section in the UI.</p> <p>The &lt;List of Selected Tab&gt; section describes the tabs that correspond to the Selected Tabs section in the UI.</p> <p>An order of value 0 (zero) corresponds to the first tab in the Selected Tabs section in the UI.</p> <p>For more information about mapping the XML values from the &lt;AvailableTab&gt; element and &lt;TabName&gt; element to their corresponding UI names, see <a href="#">Table 87 on page 411</a>.</p> |

Table 51. Elements and Sections in the Roles XML Output File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: ListOfPageLayoutAssignment&gt;   &lt;data: PageLayoutAssignment&gt;     &lt;data: RecordType&gt;UserAdmin&lt;/data: RecordType&gt;     &lt;data: LayoutName&gt;&lt;/data: LayoutName&gt;     &lt;data: PageViewType&gt;Static&lt;/data: PageViewType&gt;   &lt;/data: PageLayoutAssignment&gt;   &lt;data: PageLayoutAssignment&gt;     &lt;data: RecordType&gt;Account&lt;/data: RecordType&gt;     &lt;data: LayoutName&gt;&lt;/data: LayoutName&gt;     &lt;data: PageViewType&gt;Static&lt;/data: PageViewType&gt;   &lt;/data: PageLayoutAssignment&gt; &lt;/data: ListOfPageLayoutAssignment&gt;</pre> | <p>This section describes the page layout assigned for each record type.</p> <p>If the &lt;LayoutName&gt; element is not specified, then the default layout is applied. The &lt;LayoutName&gt; element specifies the name of a page layout, which will be a dynamic page layout if &lt;PageViewType&gt; has a value of Dynamic.</p> <p>The &lt;PageViewType&gt; element value must be either Static or Dynamic. For more information about dynamic page layouts, see <a href="#">“Migrating Dynamic Page Layouts” on page 147</a>.</p> <p>For more information about mapping the XML values from the &lt;RecordType&gt; element to their corresponding UI names, see <a href="#">Table 87 on page 411</a>.</p> |
| <pre>&lt;data: ListOfSearchLayoutAssignment&gt;   &lt;data: SearchLayoutAssignment&gt;     &lt;data: RecordType&gt;Account&lt;/data: RecordType&gt;     &lt;data: LayoutName&gt;asd&lt;/data: LayoutName&gt;   &lt;/data: SearchLayoutAssignment&gt;   &lt;data: SearchLayoutAssignment&gt;     &lt;data: RecordType&gt;Opportunity&lt;/data: RecordType&gt;     &lt;data: LayoutName&gt;&lt;/data: LayoutName&gt;   &lt;/data: SearchLayoutAssignment&gt; &lt;/data: ListOfSearchLayoutAssignment&gt;</pre>  | <p>This section describes the search layout assigned for each record type.</p> <p>For more information about mapping the XML values from the &lt;RecordType&gt; element to their corresponding UI names, see <a href="#">Table 87 on page 411</a>.</p>   |

Table 51. Elements and Sections in the Roles XML Output File

| Element or Section   | Description  |
|--|--|
| <pre> &lt;data: ListOfHomepageLayoutAssignment&gt;   &lt;data: HomepageLayoutAssignment&gt;     &lt;data: RecordType&gt;Homepage&lt;/data: RecordType&gt;     &lt;data: LayoutName&gt;My Homepage Custom Layout     &lt;/data: LayoutName&gt;   &lt;/data: HomepageLayoutAssignment&gt;   &lt;data: HomepageLayoutAssignment&gt;     &lt;data: RecordType&gt;Program&lt;/data: RecordType&gt;     &lt;data: LayoutName&gt;&lt;/data: LayoutName&gt;   &lt;/data: HomepageLayoutAssignment&gt;   &lt;data: HomepageLayoutAssignment&gt;     &lt;data: RecordType&gt;Partner&lt;/data: RecordType&gt;     &lt;data: LayoutName&gt;&lt;/data: LayoutName&gt;   &lt;/data: HomepageLayoutAssignment&gt;   &lt;data: HomepageLayoutAssignment&gt;     &lt;data: RecordType&gt;Account&lt;/data: RecordType&gt;     &lt;data: LayoutName&gt;My Custom Account Homepage Layout     &lt;/data: LayoutName&gt;   &lt;/data: HomepageLayoutAssignment&gt; &lt;/data: ListOfHomepageLayoutAssignment&gt; </pre> | <p>This section describes the homepage layout assigned for each record type.</p> <p>For more information about mapping the XML values from the &lt;RecordType&gt; element to their corresponding UI names, see <a href="#">Table 87 on page 411</a>.</p> |

## Migrating Roles

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate roles:

- [“Extracting All Roles” on page 167](#)
- [“Updating or Inserting a Specific Role \(Upsert\)” on page 168](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting All Roles

This topic describes how to extract all roles from your Oracle CRM On Demand environment (customer test environment or production).

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all roles:

```
mi grationtool -u UserID -s ServerURL ReadAll Role
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Roles

The following is an example of extracting all roles from your Oracle CRM On Demand server:

```
mi grationtool -u UserID -s ServerURL ReadAll Role
```

## Updating or Inserting a Specific Role (Upsert)

This topic describes how to update a specific role (if it exists) or insert the role (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific role (if it exists) or insert the role (if it does not exist):

```
mi grationtool -u UserID -s ServerURL Upsert Role RoleXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *RoleXML* is the fully qualified path name of the role XML file, for example:

```
C:\My Files\MyRole.xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting a Role

The following is an example of updating a role (if it exists) or inserting the role (if it does not exist) in your Oracle CRM On Demand server:

```
mi grationtool -u UserID -s ServerURL Upsert Role "C:\My Files\MyRole.xml"
```

**NOTE:** Quotation marks are required only if the name contains spaces.



# 21 Migrating Workflow Rules and Action Sets

---

This chapter describes how to migrate workflow rules and action sets by using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Workflow Rules on page 170](#)
- [Workflow Action Sets on page 173](#)
- [Privileges Required for Migrating Workflow Rules and Action Sets on page 175](#)
- [Elements and Sections in the Workflow Rules Output File on page 176](#)
- [Elements and Sections in the Workflow Action Sets Output File on page 177](#)
- [Migrating Workflow Rules on page 187](#)
- [Migrating Workflow Action Sets on page 193](#)

# Workflow Rules

A *workflow rule* is an instruction to Oracle CRM On Demand to perform one or more actions automatically, each time a specified event occurs. [Table 52](#) describes the Oracle Migration Tool On Demand client commands that are used with workflow rules. The commands are case sensitive. For examples of running these commands, see [“Migrating Workflow Rules” on page 187](#).

Table 52. Oracle Migration Tool On Demand Commands for Workflow Rules

| Command   | Description  |
|---|--|
| <p>Read WorkflowRuleSet<br/> <i>RecordType TriggerEvent</i><br/>                     [<i>ParentRecordType</i>]<br/>                     [<i>WorkflowName</i>]</p> | <p>This command exports a set of workflow rules or a single workflow rule from an Oracle CRM On Demand server. At a minimum, you must specify a record type and a trigger event, or else specify a workflow rule name together with empty values for the record type, trigger event, and parent record type parameters. An empty value is specified as a set of double quotation marks (""). The parameters are as follows:</p> <ul style="list-style-type: none"> <li>■ <i>RecordType</i> is the system name of the record type for the set of workflow rules. If you specify a workflow rule name in the command, then you do not need to specify a record type, but you must include an empty value for the <i>RecordType</i> parameter.</li> <li>■ <i>TriggerEvent</i> is the code for the trigger event, see <a href="#">Table 53 on page 173</a>. If you specify a record type, then you must specify a trigger event. If you specify a workflow rule name, then you do not need to specify a trigger event, but you must include an empty value for the <i>TriggerEvent</i> parameter.</li> <li>■ <i>ParentRecordType</i> is the system name of the parent record type for the workflow rules. This parameter is applicable only if the workflow rule has a parent record and the trigger event is Associate or Dissociate. If you specify a workflow rule name in the command, and if you do not want to specify a parent record type, then you must include an empty value for the <i>ParentRecordType</i> parameter.</li> <li>■ <i>WorkflowName</i> is the name of the workflow rule. You can read an individual workflow rule by specifying a value for the <i>WorkflowName</i> parameter.</li> </ul> |
| <p>ReadAllWorkflowRuleSet</p>   | <p>This command exports all workflow rules from an Oracle CRM On Demand server.</p>  |

Table 52. Oracle Migration Tool On Demand Commands for Workflow Rules

| Command  | Description   |
|--|---|
| <p>Upsert WorkflowRuleSet<br/><i>WorkflowRulesXML</i></p>  | <p>This command updates or inserts a set of workflow rules on an Oracle CRM On Demand server.</p> <p><b>NOTE:</b> When you use the Upsert command, you must include all of the definition for the workflow rule set in the XML file. Otherwise, some content might be unintentionally removed when you run the Upsert command, because the Upsert command deletes any existing workflow rules for which it does not find a match in the input XML file. For example, if the existing rule sets for a trigger event are not included in the XML file used for the Upsert command, then these rule sets are deleted. For more information about considerations that apply to the Upsert command, see <a href="#">“Considerations That Apply to Upsert Operations” on page 172.</a></p>  |
| <p>Delete WorkflowRuleSet<br/><i>RecordType TriggerEvent</i><br/>[<i>ParentRecordType</i>]<br/>[<i>WorkflowName</i>]</p> | <p>This command deletes the specified workflow rules from an Oracle CRM On Demand server. At a minimum, you must specify a record type and a trigger event, or else specify a workflow rule name together with empty values for the record type, trigger event, and parent record type parameters. An empty value is specified as a set of double quotation marks (""). The parameters are as follows:</p> <ul style="list-style-type: none"> <li>■ <i>RecordType</i> is the system name of the record type for the set of workflow rules. If you specify a workflow rule name in the command, then you do not need to specify a record type, but you must include an empty value for the <i>RecordType</i> parameter.</li> <li>■ <i>TriggerEvent</i> is the code for the trigger event, see <a href="#">Table 53 on page 173.</a> If you specify a record type, then you must specify a trigger event. If you specify a workflow rule name in the command, then you do not need to specify a trigger event, but you must include an empty value for the <i>TriggerEvent</i> parameter.</li> <li>■ <i>ParentRecordType</i> is the system name of the parent record type for the workflow. This parameter is applicable only if the workflow has a parent record and the trigger event is Associate or Dissociate. If you specify a workflow rule name in the command, and if you do not want to specify a parent record type, then you must include an empty value for the <i>ParentRecordType</i> parameter.</li> <li>■ <i>WorkflowName</i> is the name of the workflow rule. This parameter is optional. You can delete an individual workflow rule by specifying a value for the <i>WorkflowName</i> parameter.</li> </ul> |

Table 52. Oracle Migration Tool On Demand Commands for Workflow Rules

| Command  | Description   |
|--|---|
| InsertOrUpdate<br>WorkflowRuleSet<br><i>WorkflowRuleSetXML</i> | This command updates a workflow rule if there is a matching workflow rule. If there is not a matching workflow rule, then the command inserts a new workflow rule.<br><br><b>NOTE:</b> Unlike the Upsert command, the InsertOrUpdate command does not delete any existing workflow rule for which it does not find a match in the input XML file. |

The output from the extraction is saved to the *TriggerEvent.xml* file as follows:

- If the *ParentRecordType* parameter has an empty value, then the output is saved to the following directory:

*migration tool install/repository/WorkflowRuleSet/RecordType*

- If the *ParentRecordType* parameter does not have an empty value, then the output is saved to the following directory:

*migration tool install/repository/WorkflowRuleSet/RecordType/ParentRecordType*

The directory structure is automatically created. The structure is based on the unique combination of the record type, and parent record type, if applicable, and the trigger event. The exported XML files do not contain any workflow rule set that is based on a different record type or trigger event.

### Considerations That Apply to Upsert Operations

When you run the Upsert command for workflow rules, the existing workflow rules are updated, new workflow rules are inserted, and rules that are not in the request are deleted. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

The following considerations apply to Upsert operations for workflow rules:

- The workflow rules are ordered as they appear in the input XML file.
- You cannot upsert two workflow rules with the same order.
- If the workflow rule name does not match an existing workflow rule name, then a new workflow rule is created.
- If the workflow rule name matches an existing workflow rule name, then the record type and trigger event cannot be modified.
- The migration service protects data from becoming corrupted if the workflow rule is edited during loading, or loaded twice simultaneously, or extracted while it is being loaded.
- The input file must contain only the workflow rules that are based on a unique combination of a record type and trigger event. For example, the input file can contain one or many workflow rules based on the Account record type and the When New Record Saved trigger event. The input file cannot contain another workflow rule with a different record type or trigger event.
- The user running the Upsert command must have access to the object so that the Upsert command completes successfully.

Table 53 maps the workflow trigger events to the trigger event language independent code (LIC).

Table 53. Workflow Trigger Events

| Trigger Event                  | Trigger Event Language Independent Code |
|--------------------------------|---|
| When New Record Saved          | WriteRecordNew                          |
| When Modified Record Saved     | WriteRecordUpdated                      |
| Before Modified Record Saved   | PreWriteRecord                          |
| Before Record Is Deleted       | PreDeleteRecord                         |
| After Association With Parent  | Associate                               |
| After Dissociation From Parent | Dissociate                              |
| When Record Is Restored        | RestoreRecord                           |
| When Records Are Merged        | MergeRecords                            |

## Workflow Action Sets

A *workflow action set* is an ordered series of workflow actions of different types. The complete set of workflow actions are: CreateTask, Wait, SendEmail, CreateIntegrationEvent, FieldUpdate, AssignBook, SyncOwnerPartner, SyncBookPartner, SyncPartnerBooks, and AutoCallSubmit. For more information about workflow actions, see *Oracle CRM On Demand Online Help*.

Table 54 describes the Oracle Migration Tool On Demand client commands that are used with workflow actions and workflow action sets. The commands are case sensitive. For examples of running these commands, see “Migrating Workflow Action Sets” on page 193.

Table 54. Oracle Migration Tool On Demand Commands for Workflow Action Sets

| Command  | Description  |
|--|--|
| <p>Read WorkflowActionSet <i>WorkflowRuleName</i><br/>                     [<i>WorkflowActionName</i>] [<i>ActiveFlag</i>]</p> | <p>This command exports a set of workflow actions or a single workflow action for a specified workflow rule from an Oracle CRM On Demand server. The parameters are as follows:</p> <ul style="list-style-type: none"> <li>■ <i>WorkflowRuleName</i> is the name of the workflow rule.</li> <li>■ <i>WorkflowActionName</i> is the name of a workflow action on the specified rule. This is an optional parameter. However, if you do not want to specify a workflow action name, and if you want to use the <i>ActiveFlag</i> argument to filter the workflow actions that are exported, then you must specify an empty value for the <i>WorkflowActionName</i> parameter. An empty value is specified as a set of double quotation marks ("").</li> <li>■ <i>ActiveFlag</i> is an optional argument that you can use to filter the workflow actions that are exported, based on the value of the Active check box on the workflow actions. The valid values are true (the Active check box is selected) and false (the Active check box is not selected).</li> </ul> |
| <p>ReadForRuleSet WorkflowActionSet<br/> <i>RecordType TriggerEvent</i></p>  | <p>This command exports all the actions for each workflow rule that is based on the specified record type and trigger event from an Oracle CRM On Demand server.</p>   |

Table 54. Oracle Migration Tool On Demand Commands for Workflow Action Sets

| Command   | Description  |
|---|--|
| <p>Upsert WorkflowActionSet<br/><i>WorkflowActionSetXML</i></p>         | <p>This command updates or inserts a workflow action set on an Oracle CRM On Demand server.</p> <p><b>NOTE:</b> When you use the Upsert command, you must include all of the definition for the workflow action set in the XML file. Otherwise, some content might be unintentionally removed when you run the Upsert command, because the Upsert command deletes any existing workflow actions for which it does not find a match in the input XML file. For example, if the existing actions for a trigger event are not part of the XML file used for the Upsert command, then these actions are deleted.</p> |
| <p>InsertOrUpdate WorkflowActionSet<br/><i>WorkflowActionSetXML</i></p> | <p>This command updates a workflow action set if there is a matching workflow action set. If there is not a matching workflow action set, then the command inserts a new workflow action set.</p> <p><b>NOTE:</b> Unlike the Upsert command, the InsertOrUpdate command does not delete any existing workflow action for which it does not find a match in the input XML file.</p>   |

## Privileges Required for Migrating Workflow Rules and Action Sets

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access.
- For the Upsert and InsertOrUpdate commands: Manage Data Rules - Manage Workflow Rules, Manage Data Rules - Manage Workflow Rules for Users (for workflow rules and actions for the User record type only), and Workflow Cancel Save (if applicable). The Workflow Cancel Save privilege is required if the Cancel Save setting is to be updated or inserted.

The Workflow Cancel Save privilege is required if the trigger event for the workflow rule is Before Modified Record Saved and the Cancel Save option is available for the record type. The Workflow Cancel Save privilege is not required for the Opportunity record type because the Cancel Save option is available with the Manage Data Rules - Manage Workflow Rules privilege.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Workflow Rules Output File

Table 55 describes the elements and sections in the workflow rules XML file.

Table 55. Elements and Sections in the Workflow Rules XML File

| Element or Section   | Description   |
|--|---|
| <code>&lt;data: TriggerEvent&gt;WriteRecordNew&lt;/data: TriggerEvent&gt;</code>   | <code>&lt;TriggerEvent&gt;</code> specifies the trigger event code that triggers the workflow.  |
| <code>&lt;data: ParentRecordType&gt;&lt;/data: ParentRecordType&gt;</code>   | (Optional.) <code>&lt;ParentRecordType&gt;</code> specifies the system name of the parent record type. It is specified if the trigger event is Associate or Dissociate. See <i>Oracle CRM On Demand Online Help</i> or the Workflow UI for the valid combination of RecordType, TriggerEvent, and ParentRecordType.   |
| <code>&lt;data: WorkflowRule&gt;&lt;/data: WorkflowRule&gt;</code>   | The <code>&lt;WorkflowRule&gt;</code> section contains the elements for one workflow rule.  |
| <code>&lt;data: WorkflowRule&gt;</code><br><code>  &lt;data: WorkflowName&gt;Opportunity Rule&lt;/data: WorkflowName&gt;</code><br><code>&lt;/data: WorkflowRule&gt;</code>  | <code>&lt;WorkflowName&gt;</code> specifies the name of the workflow. This field has a maximum of 50 characters.  |
| <code>&lt;data: WorkflowRule&gt;</code><br><code>  &lt;data: Active&gt;true&lt;/data: Active&gt;</code><br><code>&lt;/data: WorkflowRule&gt;</code>  | <code>&lt;Active&gt;</code> is set to true or false.  |
| <code>&lt;data: WorkflowRule&gt;</code><br><code>  &lt;data: Exit&gt;false&lt;/data: Exit&gt;</code><br><code>&lt;/data: WorkflowRule&gt;</code>   | <code>&lt;Exit&gt;</code> is the exit field in the user interface. You can set it to True or False.   |
| <code>&lt;data: WorkflowRule&gt;</code><br><code>  &lt;data: WorkflowRuleCondition&gt;[{Primary Revenue Win Probability}]&gt;=LookupValue("PROB", "90")&lt;/data: WorkflowRuleCondition&gt;</code><br><code>&lt;/data: WorkflowRule&gt;</code> | <code>&lt;WorkflowRuleCondition&gt;</code> is a valid expression, as defined in the <i>Oracle CRM On Demand Online Help</i> , that defines a rule for performing workflow actions. This field has a maximum of 2048 characters. In this example, the condition specifies that the actions are performed if the Probability % field on the new opportunity is set to 90 or higher. |
| <code>&lt;data: WorkflowRule&gt;</code><br><code>  &lt;data: CancelSave&gt;false&lt;/data: CancelSave&gt;</code><br><code>&lt;/data: WorkflowRule&gt;</code>   | <code>&lt;CancelSave&gt;</code> is set to True or False. The Workflow Cancel Save privilege is required to change this field during an Upsert operation.  |



Table 55. Elements and Sections in the Workflow Rules XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: WorkflowRule&gt;   . . .   &lt;data: Order&gt;1&lt;/data: Order&gt;   . . . &lt;/data: WorkflowRule&gt;</pre>  | <p>&lt;Order&gt; is the order number for the workflow rule. It determines the order in which Oracle CRM On Demand invokes a sequence of workflow rules that are based on the same record type and the same trigger event, and if applicable, on the same parent record type.</p>   |
| <pre>&lt;data: WorkflowRule&gt;   . . .   &lt;data: DisplayMessage&gt;&lt;/data: DisplayMessage&gt;   . . . &lt;/data: WorkflowRule&gt;</pre>   | <p>&lt;DisplayMessage&gt; contains the text messages displayed if &lt;CancelSave&gt; is set to True. The Workflow Cancel Save privilege is required to upsert a workflow rule set that contains the &lt;CancelSave&gt; tag. This field has a maximum of 1999 characters.</p>   |
| <pre>&lt;data: WorkflowRule&gt;   . . .   &lt;data: Description&gt;Workflow Rule for new   opportunities with probability at 90% or higher   &lt;/data: Description&gt; &lt;/data: WorkflowRule&gt;</pre>   | <p>&lt;Description&gt; contains additional information about the workflow rule.</p>  |
| <pre>&lt;data: ListOfWorkflowTranslations&gt;   &lt;data: WorkflowTranslation&gt;     &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt;     &lt;data: DisplayMessageTranslation&gt;This Record     can not be updated, since workflow Cancel Save     (Acc_WF_2 ) is in Active status.     &lt;/data: DisplayMessageTranslation&gt;   &lt;/data: WorkflowTranslation&gt;   &lt;data: WorkflowTranslation&gt;     &lt;data: LanguageCode&gt;ENG&lt;/data: LanguageCode&gt;     &lt;data: DisplayMessageTranslation&gt;This Record     can not be updated.     &lt;/data: DisplayMessageTranslation&gt;   &lt;/data: WorkflowTranslation&gt; &lt;/data: ListOfWorkflowTranslations&gt;</pre> | <p>This section specifies the various translation values for the workflow Cancel Save message.</p> <ul style="list-style-type: none"> <li>■ &lt;ListOfWorkflowTranslations&gt; specifies the workflows messages in the languages activated for your company.</li> <li>■ &lt;WorkflowTranslation&gt; specifies the workflow for one language.</li> <li>■ &lt;LanguageCode&gt; specifies the three-letter language code for the language.</li> <li>■ &lt;DisplayMessageTranslation&gt; contains the translated display message.</li> </ul> |

## Elements and Sections in the Workflow Action Sets Output File

The following topics describe the elements and sections for various workflow action sets:

- [“Assign a Book Workflow Action Set” on page 178](#)
- [“Send Email Workflow Action Set” on page 180](#)
- [“Create Task Workflow Action Set” on page 183](#)
- [“Wait Action Workflow Action Set” on page 184](#)
- [“Field Update Workflow Action Set” on page 186](#)

- ["Integration Event Workflow Action Set" on page 186](#)
- ["Submit Call Workflow Action Set" on page 187](#)

## Assign a Book Workflow Action Set

Table 56 describes the elements and sections in the Assign a Book workflow action set XML output file.

Table 56. Elements and Sections in the Assign a Book Workflow Action XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: WorkflowName&gt;Opportunity Rule &lt;/data: WorkflowName&gt;</pre>  | <p>This element contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>  |
| <pre>&lt;data: WorkflowAction&gt; &lt;data: Name&gt;BookAssignTest &lt;/data: Name&gt; &lt;data: Active&gt;true&lt;/data: Active&gt; &lt;data: Order&gt;1&lt;/data: Order&gt; &lt;data: WorkflowAssignBookAction&gt; . . . &lt;/data: WorkflowAssignBookAction&gt; &lt;/data: WorkflowAction&gt;</pre> | <p>This section contains the Assign a Book workflow action. The &lt;Order&gt; element is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.</p>  |
| <pre>&lt;data: WorkflowAssignBookAction&gt; &lt;data: BookName&gt;MyBook&lt;/data: BookName&gt; &lt;data: BookExpr/&gt; . . . &lt;/data: WorkflowAssignBookAction&gt;</pre>  | <p>If the &lt;AssignmentOption&gt; element value is anything other than Remove all, then either the &lt;BookName&gt; element or the &lt;BookExpr&gt; element is required, to specify the target book. The <i>target book</i> is the book that is to be assigned to records, or removed from records, by the workflow action. The target book is specified as follows:</p> <ul style="list-style-type: none"> <li>■ &lt;BookName&gt; optionally specifies the name of the target book.</li> <li>■ &lt;BookExpr&gt; optionally contains an expression that evaluates to the name of a book.</li> </ul> <p><b>NOTE:</b> If the &lt;BookName&gt; and &lt;BookExpr&gt; elements both contain a value in an input file for an Upsert or InsertOrUpdate command, then only the value of the &lt;BookName&gt; element is saved in Oracle CRM On Demand.</p> |

Table 56. Elements and Sections in the Assign a Book Workflow Action XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: WorkflowAssignBookAction&gt;   &lt;data: AssignmentOption&gt;Replace Only &lt;/data: AssignmentOption&gt; &lt;/data: WorkflowAssignBookAction&gt;</pre>                           | <p>The &lt;AssignmentOption&gt; element specifies the type of book assignment. The valid values are as follows:</p> <ul style="list-style-type: none"> <li>■ <b>Add.</b> This option assigns the target book to all records.</li> <li>■ <b>Replace.</b> This option assigns the target book to all records and removes any previously assigned books that have the same type as the target book.</li> <li>■ <b>Replace All.</b> This option assigns the target book to all records and removes all previously assigned books, regardless of type.</li> <li>■ <b>Replace Only.</b> This option specifies that a currently assigned book is to be replaced by the target book. If the &lt;AssignmentOption&gt; element value is Replace Only, then the &lt;ReplaceBookName&gt; element or the &lt;ReplaceBookExpr&gt; element specifies the book that is to be replaced.</li> <li>■ <b>Remove.</b> This option removes the existing assignment to the target book from all records.</li> <li>■ <b>Remove All.</b> This option removes all assigned books from the records.</li> </ul> |
| <pre>&lt;data: WorkflowAssignBookAction&gt;   &lt;data: ReplaceBookName&gt;NewBook &lt;/data: ReplaceBookName&gt;   &lt;data: ReplaceBookExpr/&gt; &lt;/data: WorkflowAssignBookAction&gt;</pre> | <p>If the &lt;AssignmentOption&gt; element value is Replace Only, then either the &lt;ReplaceBookName&gt; element or the &lt;ReplaceBookExpr&gt; element is required, to specify the book that is to be replaced. The elements are as follows:</p> <ul style="list-style-type: none"> <li>■ &lt;ReplaceBookName&gt; optionally contains the name of the book that is to be replaced.</li> <li>■ &lt;ReplaceBookExpr&gt; optionally contains an expression that evaluates to the name of the book that is to be replaced.</li> </ul> <p><b>NOTE:</b> If the &lt;ReplaceBookName&gt; and &lt;ReplaceBookExpr&gt; elements both contain a value in an input file for an Upsert or InsertOrUpdate command, then only the value of the &lt;ReplaceBookName&gt; element is saved in Oracle CRM On Demand.</p>   |

Table 56. Elements and Sections in the Assign a Book Workflow Action XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: WorkflowAssignBookAction&gt;   &lt;data: ApplyTo&gt;Both&lt;/data: ApplyTo&gt; &lt;/data: WorkflowAssignBookAction&gt;</pre> | <p>The &lt;ApplyTo&gt; element specifies the cases in which the new book assignment will be made. The &lt;ApplyTo&gt; element is required if the &lt;AssignmentOption&gt; element value is anything other than Add. The valid values are as follows:</p> <ul style="list-style-type: none"> <li>■ <b>Manual.</b> The book assignment will be made only in cases where the previous book assignment was made manually.</li> <li>■ <b>Auto.</b> The book assignment will be made only in cases where the previous book assignment was made through workflow or a batch assignment.</li> <li>■ <b>Both.</b> The new book assignment will be made in all cases.</li> </ul> |

## Send Email Workflow Action Set

Table 57 describes the elements and sections in the Send Email workflow action set XML output file.

Table 57. Elements and Sections in the Send Email Workflow Action XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: WorkflowName&gt;Opportunity Approval &lt;/data: WorkflowName&gt;</pre>  | <p>This element contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>  |
| <pre>&lt;data: WorkflowAction&gt;   &lt;data: Name&gt;SendEmailTest&lt;/data: Name&gt;   &lt;data: Active&gt;true&lt;/data: Active&gt;   &lt;data: Order&gt;2&lt;/data: Order&gt;   &lt;data: WorkflowSendEmailAction&gt;   &lt;/data: WorkflowSendEmailAction&gt; &lt;/data: WorkflowAction&gt;</pre> | <p>This section contains the Send Email workflow action.</p> <p>The &lt;Order&gt; element is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions.</p> |

Table 57. Elements and Sections in the Send Email Workflow Action XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: WorkflowSendEmailAction&gt;   . . .   &lt;data: FromType&gt;FROM_EMAIL_ADDRESS   &lt;/data: FromType&gt;   . . . &lt;/data: WorkflowSendEmailAction&gt;</pre> | <p>The &lt;FromType&gt; element corresponds to the From field in the user interface (UI). It indicates the source of the From email address. The valid options are:</p> <ul style="list-style-type: none"> <li>■ <b>FROM_EMAIL_ADDRESS.</b> This value corresponds to the Current User option in the UI.</li> <li>■ <b>FROM_DEFAULT.</b> This value corresponds to the Default Email Address option in the UI.</li> <li>■ <b>SPECIFIC_EMAIL_ADDRESS.</b> This value corresponds to the Specific Email Address option in the UI.</li> </ul>  |
| <pre>&lt;data: WorkflowSendEmailAction&gt;   . . .   &lt;data: From&gt;&lt;/data: From&gt;   . . . &lt;/data: WorkflowSendEmailAction&gt;</pre>                              | <p>The &lt;From&gt; element contains the From email address when the &lt;FromType&gt; element is set to: Specific Email Address.</p>  |
| <pre>&lt;data: WorkflowSendEmailAction&gt;   . . .   &lt;data: ToType&gt;R&lt;/data: ToType&gt;   . . . &lt;/data: WorkflowSendEmailAction&gt;</pre>                         | <p>The &lt;ToType&gt; element corresponds to the To field in the UI. It indicates the type of the To email address. The valid options are:</p> <ul style="list-style-type: none"> <li>■ <b>R.</b> Corresponds to the Relative User on Record option in the UI.</li> <li>■ <b>U.</b> Corresponds to the Specific User option in the UI.</li> <li>■ <b>E.</b> Corresponds to the Specific Email Address option in the UI.</li> </ul>  |
| <pre>&lt;data: WorkflowSendEmailAction&gt;   . . .   &lt;data: To&gt;O_Primary_Owner_Id&lt;/data: To&gt;   . . . &lt;/data: WorkflowSendEmailAction&gt;</pre>                | <p>The &lt;To&gt; element's value depends on the &lt;ToType&gt; element:</p> <ul style="list-style-type: none"> <li>■ If the &lt;ToType&gt; element is set to U (Specific User), then the &lt;To&gt; element contains the User ID of the user.</li> <li>■ If the &lt;ToType&gt; element is set to R (Relative User on Record), then the value of the &lt;To&gt; element is defined, see <a href="#">Table 59 on page 184</a>.</li> <li>■ If the &lt;ToType&gt; element is set to E (Specific Email Address), then the &lt;To&gt; element contains the expression defined for specific email addresses.</li> </ul> |
| <pre>&lt;data: WorkflowSendEmailAction&gt;   . . .   &lt;data: Subject&gt;New Opportunity   &lt;/data: Subject&gt;   . . . &lt;/data: WorkflowSendEmailAction&gt;</pre>      | <p>The &lt;Subject&gt; element contains the subject line for the email.</p>   |

Table 57. Elements and Sections in the Send Email Workflow Action XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: WorkflowSendEmailAction&gt;   . . .   &lt;data: MessageFormat&gt;HTML   &lt;/data: MessageFormat&gt;   . . . &lt;/data: WorkflowSendEmailAction&gt;</pre>   | <p>The &lt;MessageFormat&gt; specifies the format for the email message, which can be Plain Text or HTML.</p>   |
| <pre>&lt;data: WorkflowSendEmailAction&gt;   . . .   &lt;data: MessageBody&gt;A new &amp;lt;t; b&gt;high   potential&amp;lt;t; /b&gt; opportunity has been   created. &lt;/data: MessageBody&gt;   . . . &lt;/data: WorkflowSendEmailAction&gt;</pre>  | <p>The &lt;MessageBody&gt; element contains the content of the email message. For information about the HTML elements that are supported for use in workflow email messages, see <i>Oracle CRM On Demand Online Help</i>.</p> <p><b>NOTE:</b> When updating or inserting a workflow action with an email message in HTML format, the left angle bracket (&lt;) at the start of each HTML tag must be encoded as &amp;lt;. At the end of the HTML tag, the right angle bracket (&gt;) can be used, or it can be encoded as &amp;gt;. When you extract a workflow action that has an email message in HTML format, Oracle CRM On Demand automatically encodes the left angle brackets in the extracted email message.</p> |
| <pre>&lt;data: WorkflowSendEmailAction&gt;   . . .   &lt;data: ListOfWorkflowEmailTranslations&gt;   &lt;data: WorkflowEmailTranslation&gt;   &lt;data: LanguageCode&gt;ENU   &lt;/data: LanguageCode&gt;   &lt;data: SubjectTranslation&gt;New   Opportunity&lt;/data: SubjectTranslation&gt;   &lt;data: MessageBodyTranslation&gt;A new   &amp;lt;t; b&gt;high potential&amp;lt;t; /b&gt; opportunity has   been created.   &lt;/data: MessageBodyTranslation&gt;   &lt;/data: WorkflowEmailTranslation&gt;   &lt;/data: ListOfWorkflowEmailTranslations&gt;   . . . &lt;/data: WorkflowSendEmailAction&gt;</pre> | <p>This section contains the translation values for the email subject and message, as follows:</p> <ul style="list-style-type: none"> <li>■ &lt;ListOfWorkflowEmailTranslations&gt; contains the translations for each of the languages for which a translation has been added.</li> <li>■ &lt;WorkflowEmailTranslation&gt; contains the translation for one language.</li> <li>■ &lt;LanguageCode&gt; contains the three-letter language code for the language.</li> <li>■ &lt;SubjectTranslation&gt; contains the translated email subject line for the language.</li> <li>■ &lt;MessageBodyTranslation&gt; contains the translated email message body text for the language.</li> </ul>                              |

## Create Task Workflow Action Set

Table 58 describes the elements and sections in the Create Task workflow action set XML output file.

Table 58. Elements and Sections in the Create Task Workflow Action Set XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data:WorkflowName&gt;Opportunity Approval &lt;/data:WorkflowName&gt;</pre>  | <p>This element contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>   |
| <pre>&lt;data:WorkflowAction&gt; &lt;data:Name&gt;CreateTaskTest&lt;/data:Name&gt; &lt;data:Active&gt;false&lt;/data:Active&gt; &lt;data:Order&gt;3&lt;/data:Order&gt; &lt;data:WorkflowCreateTaskAction&gt; &lt;data:Owner&gt;0_Primary Owner Id&lt;/data:Owner&gt; &lt;data:OwnerType&gt;R&lt;/data:OwnerType&gt; &lt;data:Type&gt;Approval &lt;/data:Type&gt; &lt;data:SubType&gt;Callback&lt;/data:SubType&gt; &lt;data:DueDate&gt;Today()+2&lt;/data:DueDate&gt; &lt;data:Priority&gt;2-Medium&lt;/data:Priority&gt; &lt;data:Status&gt;Not Started&lt;/data:Status&gt; &lt;data:TaskCurrency&gt;CAD&lt;/data:TaskCurrency&gt; &lt;data:Private&gt;false&lt;/data:Private&gt; &lt;data:Subject&gt;Follow Up New Opportunity &lt;/data:Subject&gt; &lt;data:Description&gt;&lt;/data:Description&gt; &lt;/data:WorkflowCreateTaskAction&gt; &lt;/data:WorkflowAction&gt;</pre> | <p>This section contains the Create Task workflow action elements:</p> <ul style="list-style-type: none"> <li>■ <b>&lt;Order&gt;</b> is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions.</li> <li>■ <b>&lt;OwnerType&gt;</b> corresponds to the Owner field in the user interface. The valid values are: <ul style="list-style-type: none"> <li>■ <b>R.</b> Corresponds to the Relative User On Record option in the user interface.</li> <li>■ <b>U.</b> Corresponds to the Specific User option in the user interface.</li> </ul> </li> <li>■ The <b>&lt;Owner&gt;</b> element's value depends on the <b>&lt;OwnerType&gt;</b> element: <ul style="list-style-type: none"> <li>■ If the <b>&lt;OwnerType&gt;</b> element is set to U (Specific User), then this element contains the name of the user.</li> <li>■ If the <b>&lt;OwnerType&gt;</b> element is set to R (Relative User On Record), then the value of this element is defined, see <a href="#">Table 59</a>.</li> </ul> </li> <li>■ <b>&lt;Type&gt;</b> is the activity type.</li> <li>■ <b>&lt;SubType&gt;</b> is the activity subtype.</li> </ul> |

Table 59 maps the system name for the owner that appears in the XML file to the display name in the user interface if the OwnerType element is set to R.

Table 59. System Names for the Owner Element if the Owner Type is R

| System Name in the XML File   | Display Name                           |
|-------------------------------|--|
| C_                            | Service Request Created By             |
| MA_Account Id                 | Account Owner's Manager                |
| M_Owned By Id                 | <i>Object</i> Owner's Manager          |
| M_Owner Id                    | Lead Owner's Manager                   |
| M_Primary HH Owner Id         | Household Owner's Manager              |
| M_Primary Owner Id            | <i>Object</i> Owner's Manager          |
| M_Sales Rep Id                | Salesperson's Manager                  |
| OA_Account Id                 | Account Owner                          |
| O_Owned By Id                 | Service Request Owner                  |
| O_Owner Id                    | Lead Owner                             |
| O_Primary HH Owner Id         | Household Owner                        |
| O_Primary Owner Id            | <i>Object</i> Owner                    |
| O_Sales Rep Id                | Salesperson                            |
| T_Team Role_Consultant        | <i>Object</i> Team - Consultant        |
| T_Team Role_Executive Sponsor | <i>Object</i> Team - Executive Sponsor |
| T_Team Role_Other             | <i>Object</i> Team - Other             |
| T_Team Role_Owner             | <i>Object</i> Team - Owner             |
| T_Team Role_Partner           | <i>Object</i> Team - Partner           |

## Wait Action Workflow Action Set

Table 60 describes the elements and sections in the Wait workflow action set XML output file.

Table 60. Elements and Sections in the Wait Workflow Action Set XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data:WorkflowName&gt;Opportunity Approval &lt;/data:WorkflowName&gt;</pre> | This element contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule. |



Table 60. Elements and Sections in the Wait Workflow Action Set XML File

| Element or Section   | Description  |
|--|--|
| <pre> &lt;data: WorkflowAction&gt;   &lt;data: Name&gt;WaitTest&lt;/data: Name&gt;   &lt;data: Active&gt;true&lt;/data: Active&gt;   &lt;data: Order&gt;4&lt;/data: Order&gt;   &lt;data: WorkflowWaitAction&gt;     &lt;data: ReevaluateRuleConditionsAfterWait&gt;true   &lt;/data: ReevaluateRuleConditionsAfterWait&gt;     &lt;data: WaitType&gt;Period&lt;/data: WaitType&gt;     &lt;data: DateTime&gt;&lt;/data: DateTime&gt;     &lt;data: WaitExpression&gt;PYM10DTHM   &lt;/data: WaitExpression&gt;   &lt;/data: WorkflowWaitAction&gt; &lt;/data: WorkflowAction&gt; </pre> | <p>This section contains the Wait Action elements.</p> <ul style="list-style-type: none"> <li>■ &lt;Order&gt; is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions.</li> <li>■ &lt;WaitType&gt; specifies the type of wait period selected in the user interface. The values that are valid are: <ul style="list-style-type: none"> <li>■ Period</li> <li>■ Period Expression</li> <li>■ Data Time</li> <li>■ Date Time Expression</li> </ul> </li> <li>■ The &lt;WaitExpression&gt; value depends on the &lt;WaitType&gt; element. When the &lt;WaitType&gt; value is Period, the &lt;WaitExpression&gt; element indicates the period as PYMDTHM. For example: <ul style="list-style-type: none"> <li>■ PYM10DTHM indicates 10 days.</li> <li>■ P1Y3MDTHM indicates 1 year and 3 months.</li> <li>■ PYMDT5H15M indicates 5 hours and 15 minutes.</li> </ul> </li> </ul> |

## Field Update Workflow Action Set

Table 61 describes the elements and sections in the Field Update workflow action set XML output file.

Table 61. Elements and Sections in the Field Update Workflow Action Set XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: Workfl owName&gt;Opportuni ty Approval &lt;/data: Workfl owName&gt;</pre>  | <p>This element contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>  |
| <pre>&lt;data: Workfl owActi on&gt; &lt;data: Name&gt;UpdateFiel dTest&lt;/data: Name&gt; &lt;data: Acti ve&gt;true&lt;/data: Acti ve&gt; &lt;data: Order&gt;5&lt;/data: Order&gt; &lt;data: Workfl owFiel dUpdateActi on&gt;   &lt;data: Fiel dName&gt;Total Asset Val ue&lt;/data: Fiel dName&gt;   &lt;data: Val ue&gt;10000&lt;/data: Val ue&gt;   &lt;data: Overwri teExi sti ngVal ues&gt;true &lt;/data: Overwri teExi sti ngVal ues&gt; &lt;/data: Workfl owFiel dUpdateActi on&gt; &lt;/data: Workfl owActi on&gt;</pre> | <p>This section contains the Field Update Workflow action elements. A Field Update Workflow action must be preceded by at least one Wait action.</p> <p>The &lt;Order&gt; element is the order number for the workflow action within the set of actions on the workflow rule and determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions.</p> |

## Integration Event Workflow Action Set

Table 62 describes the elements and sections in the Create Integration Event workflow action set XML output file.

Table 62. Elements and Sections in the Create Integration Event Workflow Action Set XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: Workfl owName&gt;Opportuni ty Approval &lt;/data: Workfl owName&gt;</pre> | <p>This element contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p> |

Table 62. Elements and Sections in the Create Integration Event Workflow Action Set XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: WorkflowAction&gt;   &lt;data: Name&gt;EventQueue&lt;/data: Name&gt;   &lt;data: Active&gt;true&lt;/data: Active&gt;   &lt;data: Order&gt;6&lt;/data: Order&gt;   &lt;data: WorkflowCreateIntegrationEventAction&gt;     &lt;data: ListOfQueues&gt;       &lt;data: QueueName&gt;Default Queue&lt;/data: QueueName&gt;     &lt;/data: ListOfQueues&gt;     &lt;data: ListOfFields&gt;       &lt;SchemaVersion&gt;Web Services v1.0       &lt;/SchemaVersion&gt;       &lt;data: FieldName&gt;Currency Code&lt;/data: FieldName&gt;       &lt;data: AlwaysInclude&gt;true&lt;/data: AlwaysInclude&gt;       &lt;data: TrackChanges&gt;true&lt;/data: TrackChanges&gt;     &lt;/data: ListOfFields&gt;   &lt;/data: WorkflowCreateIntegrationEventAction&gt; &lt;/data: WorkflowAction&gt;</pre> | <p>This section contains the Integration Event workflow action elements.</p> <p>The &lt;Order&gt; element is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions.</p> |

## Submit Call Workflow Action Set

Table 63 describes the elements and sections in the Submit Call workflow action set XML output file.

Table 63. Elements and Sections in the Submit Call Workflow Action Set XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: WorkflowName&gt;Activity Insert&lt;/data: WorkflowName&gt;</pre>   | <p>This element contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>  |
| <pre>&lt;data: WorkflowAction&gt;   &lt;data: Name&gt;Auto Call Submit&lt;/data: Name&gt;   &lt;data: Active&gt;true&lt;/data: Active&gt;   &lt;data: Order&gt;1&lt;/data: Order&gt;   &lt;data: WorkflowSubmitCallAction&gt;   &lt;/data: WorkflowSubmitCallAction&gt; &lt;/data: WorkflowAction&gt;</pre> | <p>This section contains the Submit Call workflow action elements.</p> <p>The &lt;Order&gt; element is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions.</p> |

## Migrating Workflow Rules

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with workflow rules:

- [“Extracting a Workflow Rule or a Workflow Rule Set” on page 188](#)

- “Extracting All Workflow Rule Sets” on page 189
- “Updating or Inserting Workflow Rules (Upsert)” on page 190
- “Updating or Inserting Workflow Rules (InsertOrUpdate)” on page 191
- “Deleting a Workflow Rule Set” on page 192

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting a Workflow Rule or a Workflow Rule Set

This topic describes how to extract a single workflow rule or a workflow rule set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to the <TriggerEvent>.xml file in the following directory:

- If the *ParentRecordType* parameter has an empty value, then the output from the extract is saved to the following directory:

*migration tool install/repository/WorkflowRuleSet/RecordType*

- If the *ParentRecordType* parameter does not have an empty value, then the output from the extract is saved to the following directory:

*migration tool install/repository/WorkflowRuleSet/RecordType/ParentRecordType*

If the workflow rule set has multiple parent record types, then only the relative order changes.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a workflow rule set:

```
migrationtool -u UserID -s ServerURL Read WorkflowRuleSet RecordType  
TriggerEvent [ParentRecordType] [WorkflowName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *RecordType* is the system name of the Oracle CRM On Demand record type (object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *TriggerEvent* is the language independent code (LIC) for the event type, see [Table 53 on page 173](#).
- *ParentRecordType* is the system name of the Oracle CRM On Demand parent record type (object). If the string contains spaces, then it must be enclosed with quotation marks.

- *WorkflowName* is the name of the Oracle CRM On Demand rule. You can read an individual workflow rule by specifying a value for the <WorkflowName> parameter.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Workflow Rule

The following is an example of extracting a specific workflow rule:

```
mi grati ontool -u UserID -s ServerURL Read Workfl owRul eSet "" "" "" MyWorkfl owRul e
```

**NOTE:** If the workflow rule name contains spaces, then it must be enclosed with quotation marks.

### Example of Extracting a Workflow Rule Set

The following is an example of extracting the entire sequence of workflow rules based on the Account record type and the Before Modified Record Saved trigger event:

```
mi grati ontool -u UserID -s ServerURL Read Workfl owRul eSet Account PreWri teRecord
```

## Extracting All Workflow Rule Sets

This topic describes how to extract all workflow rule sets from your Oracle CRM On Demand environment; that is, a customer test environment or production environment. The output from the extract is saved to the *TriggerEvent.xml* file in the following directory:

- If the *ParentRecordType* parameter has an empty value, then the output is saved to the following directory:

```
mi grati on tool install/reposit ory/Workfl owRul eSet/RecordType
```

- If the *ParentRecordType* parameter does not have an empty value, then the output is saved to the following directory:

```
mi grati on tool install/reposit ory/Workfl owRul eSet/RecordType/ParentRecordType
```

The number of records returned is not limited for the ReadAll command. If the workflow rule set has multiple parent record types, then only the relative order changes. You must correct this error by using the workflow functionality of Oracle CRM On Demand.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all workflow rule sets:

```
mi grati ontool -u UserID -s ServerURL ReadAl l Workfl owRul eSet
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting All Workflow Rule Sets

The following is an example of extracting all workflow rule sets from your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL ReadAll WorkflowRuleSet
```

## Updating or Inserting Workflow Rules (Upsert)

This topic describes how to use the Upsert command to update workflow rules (if they exist) or insert workflow rules (if they do not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

### About the Upsert Operation

When you run the Upsert command, the existing workflow rules are updated, new workflow rules are inserted, and rules that are not in the request are deleted. The order of the rules in the workflow request must match the order of the rules for the workflow result in the Oracle CRM On Demand application. The changes following the Upsert operation are applied completely or not at all.

For more information about the considerations that apply to Upsert operations, see [“Considerations That Apply to Upsert Operations” on page 172](#).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update workflow rules (if they exist) or to insert new workflow rules (if they do not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert WorkflowRuleSet WorkflowRulesXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *WorkflowRulesXML* is the fully qualified path name of the workflow rules XML file, for example:

C:\My Files\My WorkflowRules.xml

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting Workflow Rules

The following is an example of updating workflow rules (if they exist) or inserting workflow rules (if they do not exist) in your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL Upsert WorkflowRuleSet "C:\My Files\My
WorkflowRules.xml "
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.

## Updating or Inserting Workflow Rules (InsertOrUpdate)

This topic describes how to use the InsertOrUpdate command to update workflow rules (if they exist) or insert workflow rules (if they do not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *InsertOrUpdate operation*.

### About the InsertOrUpdate Operation

The InsertOrUpdate command updates workflow rules based on the following user keys:

- 1 <RecordType> and <TriggerEvent> and <Order>
- 2 <WorkflowName>

If Oracle CRM On Demand locates a workflow rule based on the user keys, then the workflow rule is updated.

If Oracle CRM On Demand cannot locate any workflow rule based on the user keys, then a new workflow rule is created.

Unlike the Upsert operation, the InsertOrUpdate operation does not delete any existing workflow rules that are not identified in the input XML file.

The changes following the InsertOrUpdate operation are applied completely or not at all.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update workflow rules (if they exist) and insert new workflow rules (if they do not exist):

```
mi grati ontool -u UserID -s ServerURL InsertOrUpdate WorkflowRuleSet WorkflowRulesXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *WorkflowRulesXML* is the fully qualified path name of the workflow rules XML file, for example:  
`C:\My Files\My WorkflowRules.xml`

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Deleting a Workflow Rule Set

This topic describes how to delete a workflow rule set based on the specified record type and trigger event. The set of workflow rules is deleted from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

**NOTE:** The Delete operation can delete any existing workflow rule set even if the authenticated user does not have access to the object.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to delete a workflow rule set:

```
migrationtool -u UserID -s ServerURL Delete WorkflowRuleSet RecordType TriggerEvent [ParentRecordType] [WorkflowName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *RecordType* is the system name of the Oracle CRM On Demand record type (object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *TriggerEvent* is the language independent code (LIC) for the event type, see [Table 53 on page 173](#).
- *ParentRecordType* is the system name of the Oracle CRM On Demand parent record type (object). If the string contains spaces, then it must be enclosed with quotation marks.
- *WorkflowName* is the name of the Oracle CRM On Demand workflow rule. You can delete an individual workflow rule by specifying a value for the *WorkflowName* parameter.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.



## Example of Deleting a Workflow Rule Set

The following is an example of deleting the entire sequence of workflow rules based on the Account record type and the Before Modified Record Saved trigger event:

```
mi grati ontool -u UserID -s ServerURL Delete Workfl owRul eSet Account PreWri teRecord
```

# Migrating Workflow Action Sets

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with workflow actions and workflow action sets:

- [“Extracting a Workflow Action or a Workflow Action Set” on page 193](#)
- [“Extracting Workflow Action Sets That Are Related to a Workflow Rule Set” on page 194](#)
- [“Updating or Inserting a Workflow Action Set \(Upsert\)” on page 196](#)
- [“Updating or Inserting Workflow Actions \(InsertOrUpdate\)” on page 197](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting a Workflow Action or a Workflow Action Set

This topic describes how to extract a single workflow action or a single workflow action set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
/Workfl owActi onSet/Workfl owRul eName.xml
```

Authenticated users can extract a specific workflow action or workflow action set. The Read operation can read any existing action set even if the authenticated user does not have access to the object or trigger event for the specified workflow.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific workflow action or workflow action set:

```
mi grati ontool -u UserID -s ServerURL Read Workfl owActi onSet Workfl owRul eName  
[Workfl owActi onName] [Acti veFl ag]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *WorkflowRuleName* is the name of a workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.

- *WorkflowActionName* is the name of a workflow action. If the string contains spaces, then it must be enclosed with quotation marks.
- *ActiveFlag* is an optional argument that you can use to filter the workflow actions that are exported, based on the value of the Active check box on the workflow actions. The valid values are true (the Active check box is selected) and false (the Active check box is not selected).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Workflow Action

The following is an example of extracting a specific workflow action:

```
migrationtool -u UserID -s ServerURL Read WorkflowActionSet MyWorkflowRule  
MyWorkflowAction
```

**NOTE:** If the workflow rule name contains spaces, then it must be enclosed with quotation marks. Similarly, if the workflow action name contains spaces, then it must be enclosed with quotation marks.

### Example of Extracting a Single Workflow Action Set

The following is an example of extracting the action set for a specific workflow rule:

```
migrationtool -u UserID -s ServerURL Read WorkflowActionSet MyWorkflowRule
```

**NOTE:** If the workflow rule name contains spaces, then it must be enclosed with quotation marks.

### Example of Extracting Active Workflow Actions in a Single Workflow Action Set

The following is an example of extracting only the workflow actions that are active in a specific workflow rule:

```
migrationtool -u UserID -s ServerURL Read WorkflowActionSet MyWorkflowRule "" true
```

**NOTE:** If the workflow rule name contains spaces, then it must be enclosed with quotation marks.

## Extracting Workflow Action Sets That Are Related to a Workflow Rule Set

This topic describes how to extract all action sets that are related to a rule set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

One WorkflowActionSet.xml file is extracted for each action set identified by the input record type, trigger event, and parent record type. The output for each action set matches the data that is extracted if a specific Read operation is used to retrieve the action set.

The output WorkflowActionSet.xml file is saved to the following directory:

- If the *ParentRecordType* parameter has an empty value, then the output is saved to the following directory:

```
migration tool install//repository/WorkflowActionSet/RecordType/TriggerEvent.xml
```

- If the *ParentRecordType* parameter does not have an empty value, then the output is saved to the following directory:

```
migration tool install//repository/WorkflowActionSet/RecordType/ParentRecordType/TriggerEvent.xml
```

Authenticated users can extract a specific workflow action set. The Read operation can read any existing action set even if the authenticated user does not have access to the object or trigger event for the specified workflow.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract workflow action sets that are related to a workflow rule set:

```
migrationtool -u UserID -s ServerURL ReadForRuleSet WorkflowActionSet RecordType TriggerEvent [ParentRecordType]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *RecordType* is the system name of the Oracle CRM On Demand record type (object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *TriggerEvent* is the language independent code (LIC) for the event type, see [Table 53 on page 173](#).
- *ParentRecordType* is the system name of the Oracle CRM On Demand parent record type (object). If the string contains spaces, then it must be enclosed with quotation marks.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting Workflow Action Sets That Are Related to a Workflow Rule Set

The following is an example of extracting workflow action sets that are related to a workflow rule set, when a new Account record is saved:

```
migrationtool -u UserID -s ServerURL ReadForRuleSet WorkflowActionSet Account WriteRecordNew
```

## Updating or Inserting a Workflow Action Set (Upsert)

This topic describes how to use the Upsert command to update a workflow action set (if it exists) or insert a workflow action set (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

Running an Upsert operation on a workflow action set is a synchronization operation. At the end of the operation, the workflow action set matches the action set in the XML file, where possible. Existing workflow actions are updated, new actions are inserted, and actions that are not in the request are deleted. The order of the actions in the workflow request matches the order of the actions in the action set XML file. The updates to workflow action sets in an Upsert operation are applied completely or not at all.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific workflow action set (if it exists) or to insert the workflow action set (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert Workfl owActi onSet Workfl owActi onSetXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *WorkflowActionSetXML* is the fully qualified path name of the workflow action set XML file, for example:

```
C: \My Fi les\My Workfl owActi onSet. xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting a Workflow Action Set

The following is an example of updating a workflow action set (if it exists) or inserting a workflow action set (if it does not exist) in your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL Upsert Workfl owActi onSet "C: \My Fi les\My  
Workfl owActi onSet. xml "
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.

## Updating or Inserting Workflow Actions (InsertOrUpdate)

This topic describes how to use the `InsertOrUpdate` command to update workflow actions (if they exist) and insert workflow actions (if they do not exist) on your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *InsertOrUpdate operation*. Unlike the `Upsert` operation, the `InsertOrUpdate` operation does not delete any existing workflow actions that are not included in the input XML file.

The `InsertOrUpdate` command updates workflow actions based on the following user keys:

- 1 <WorkflowName>
- 2 <Order>

If you want to update an existing action on a workflow rule, then all of the following conditions must be met:

- The workflow rule named in the input XML file must exist.
- The value in the <Order> element of the workflow action in the input XML file must match the order number of the existing action within the workflow rule in the Oracle CRM On Demand application.
- The action type of the workflow action in the input XML file must be the same as the action type of the existing workflow action in the Oracle CRM On Demand application.

**NOTE:** You cannot use an `InsertOrUpdate` operation to change the action type of an existing workflow action.

### About the InsertOrUpdate Operation

When you run the `InsertOrUpdate` command, the following happens:

- If Oracle CRM On Demand locates a matching workflow action based on the user keys, then the workflow action is updated.
- If Oracle CRM On Demand locates the workflow rule based on the <WorkflowName> user key, but cannot locate a matching workflow action based on the <Order> user key, then a new workflow action is created on the specified workflow rule. The next unused order number for actions on the workflow rule is assigned to the new action. For example, if there are already two actions on the workflow rule, then the new action is assigned order number 3.
- If Oracle CRM On Demand locates the workflow rule based on the <WorkflowName> user key, and locates a matching workflow action based on the <Order> user key, but the action type of the action in the input XML file is different from the action type of the corresponding action in Oracle CRM On Demand, then the action is not updated.
- Existing workflow actions that are not included in the XML request are not affected. The `InsertOrUpdate` operation does not delete any existing workflow actions that are not included in the input XML file.
- The changes following the `InsertOrUpdate` operation are applied completely or not at all.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update workflow actions (if they exist) and to insert workflow actions (if they do not exist):

```
migrationtool -u UserID -s ServerURL InsertOrUpdate WorkflowActionSet  
WorkflowActionSetXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *WorkflowActionSetXML* is the fully qualified path name of the workflow action set XML file, for example:

```
C:\My Files\My WorkflowActionSet.xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting Workflow Actions

The following is an example of updating workflow actions (if they exist) or inserting workflow actions (if they do not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL InsertOrUpdate WorkflowActionSet "C:\My  
Files\My WorkflowActionSet.xml"
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.

# 22 Migrating Assignment Rule Groups and Assignment Rules

This chapter describes how to migrate assignment rule groups and assignment rules using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Assignment Manager on page 199](#)
- [Assignment Rule Groups on page 199](#)
- [Assignment Rules on page 201](#)
- [Privileges Required for Migrating Assignment Rule Groups and Assignment Rules on page 202](#)
- [Elements and Sections in the Assignment Rule Groups Output File on page 202](#)
- [Elements and Sections in the Assignment Rules Output File on page 206](#)
- [Migrating Assignment Rule Groups on page 211](#)
- [Migrating Assignment Rules on page 215](#)

## Assignment Manager

You can configure the assignment manager in Oracle CRM On Demand to automatically assign leads, opportunities, service requests, or accounts to the appropriate person, team, or territory, based on the criteria that you configure on the assignment rules and the order in which the rules are evaluated within the assignment rule groups. Assignment rules and rule groups are supported only for the Account, Lead, Opportunity, and Service Request record types. For more information about assignment rules and rule groups, see *Oracle CRM On Demand Online Help*.

## Assignment Rule Groups

An *assignment rule group* is a set of assignment rules for a specific record type, that are evaluated according to the order specified on the rules within the group. You can create multiple assignment rule groups for a record type, but only one assignment rule group can be active for a record type at any time.

Table 64 describes the Oracle Migration Tool On Demand client commands that are used with assignment rule groups. The commands are case sensitive. For examples of running these commands, see “Migrating Assignment Rule Groups” on page 211.

Table 64. Oracle Migration Tool On Demand Commands for Assignment Rule Groups

| Command   | Description  |
|---|--|
| Read AssignmentRuleGroup<br>[SystemNameOfObject]<br>[RuleGroupName] | This command extracts all of the assignment rule groups for a specific record type (object), or a single assignment rule group (if the <i>RuleGroupName</i> parameter is specified). The parameters for the command are as follows: <ul style="list-style-type: none"> <li>■ <i>SystemNameOfObject</i> is the system name of a record type (object). The system names for the record types are listed in “System Names for Record Types” on page 411. If you specify a rule group name in the command, then you do not need to specify a record type, but you must include an empty value for the <i>SystemNameOfObject</i> parameter. An empty value is specified as a set of double quotation marks (“”).</li> <li>■ <i>RuleGroupName</i> is name of a specific rule group. You can extract an individual assignment rule group by specifying a value for the <i>RuleGroupName</i> parameter.</li> </ul> |
| ReadAll AssignmentRuleGroup   | This command extracts all assignment rule groups, for all record types.  |
| Upsert AssignmentRuleGroup<br>AssignmentRuleGroupXML                | This command inserts an assignment rule group (if it does not already exist) or updates an assignment rule group (if it already exists).   |



# Assignment Rules

An assignment rule automatically assign a lead, opportunity, service request, or account to the appropriate person, team, or territory, based on the criteria that you configure on the assignment rule. [Table 65](#) describes the Oracle Migration Tool On Demand client commands that are used with assignment rules. The commands are case sensitive. For examples of running these commands, see [“Migrating Assignment Rules” on page 215](#).

Table 65. Oracle Migration Tool On Demand Commands for Assignment Rules

| Command   | Description   |
|---|---|
| Read AssignmentRule [ <i>SystemNameOfObject</i> ]<br>[ <i>RuleGroupName</i> ] [ <i>RuleName</i> ] | This command extracts all of the assignment rules for a specific record type (object), or all of the rules within a rule group, or a single assignment rule, depending on the parameters you specify. You must specify at least one of the following parameters: <ul style="list-style-type: none"> <li>■ <i>SystemNameOfObject</i> is the system name of the record type (object). The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a>. If you specify a rule group name or a rule name with the command, then you do not need to specify a record type, but you must provide an empty value for the <i>SystemNameOfObject</i> parameter. An empty value is specified as a set of double quotation marks (“”).</li> <li>■ <i>RuleGroupName</i> is the name of an assignment rule group to which a rule belongs. If you specify the rule name, then you do not need to specify the rule group name, but you must provide an empty value for the <i>RuleGroupName</i> parameter.</li> <li>■ <i>RuleName</i> is the name of a rule. You can extract an individual assignment rule by specifying a value for the <i>RuleName</i> parameter.</li> </ul> |
| ReadAll AssignmentRule  | This command extracts all assignment rules in all assignment rule groups, for all record types.   |
| Upsert AssignmentRule <i>AssignmentRuleXML</i>  | This command inserts an assignment rule (if it does not already exist) or updates an assignment rule (if it already exists).  |

## Privileges Required for Migrating Assignment Rule Groups and Assignment Rules

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access, and Data Rules and Assignment.
- For the Upsert command: Enable Web Services Access, and Data Rules and Assignment.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Assignment Rule Groups Output File

Table 66 describes the elements and sections in the assignment rule groups XML output file.

Table 66. Elements and Sections in the Assignment Rule Groups XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: AssignmentRuleGroup&gt; . . . &lt;/data: AssignmentRuleGroup&gt;</pre>   | The <AssignmentRuleGroup> section contains all of the information for a single assignment rule group.  |
| <pre>&lt;data: AssignmentRuleGroup&gt; . . . &lt;data: RecordType&gt;Service Request&lt;/ data: RecordType&gt; . . . &lt;/data: AssignmentRuleGroup&gt;</pre>                   | <RecordType> contains the system name of the record type (object), which never changes.  |
| <pre>&lt;data: AssignmentRuleGroup&gt; . . . &lt;data: RuleGroupName&gt;SRTestGroup &lt;/data: RuleGroupName&gt; . . . &lt;/data: AssignmentRuleGroup&gt;</pre>                 | <RuleGroupName> contains the name of the assignment rule group.  |
| <pre>&lt;data: AssignmentRuleGroup&gt; . . . &lt;data: Active&gt;false&lt;/data: Active&gt; . . . &lt;/data: AssignmentRuleGroup&gt;</pre>                                      | <Active> specifies whether this assignment rule group is active (true) or inactive (false).  |
| <pre>&lt;data: AssignmentRuleGroup&gt; . . . &lt;data: UnassignedOwner&gt;EXAPMLECOMPANY/TESTUSER &lt;/data: UnassignedOwner&gt; . . . &lt;/data: AssignmentRuleGroup&gt;</pre> | <UnassignedOwner> contains the User Sign In ID of the user who inherits the records that are not assigned by one of the rules in the rule group. This element is required. |

Table 66. Elements and Sections in the Assignment Rule Groups XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: AssignmentRuleGroup&gt;   .   .   .   &lt;data: UnassignedTerritory/&gt;   .   .   . &lt;/data: AssignmentRuleGroup&gt;</pre>  | <p>&lt;UnassignedTerritory&gt; is the territory that inherits the records that are not assigned by one of the rules.</p> <p>The &lt;UnassignedTerritory&gt; element is applicable for assignment rule groups for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rule groups for other record types.</p>   |
| <pre>&lt;data: AssignmentRuleGroup&gt;   .   .   .   &lt;data: ReturnEmail&gt;test.sender@example.com   &lt;/data: ReturnEmail /&gt;   .   .   . &lt;/data: AssignmentRuleGroup&gt;</pre>   | <p>&lt;ReturnEmail&gt; is the email address that appears in the Sender field in the email notifications that are sent to the owners of leads and service requests when the records are assigned to them by the assignment manager. Also, if the record owner replies to the email, then the To address in the return email is set to this email address.</p> <p>The &lt;ReturnEmail&gt; element is applicable for assignment rule groups for the Lead and Service Request record types only. This element is ignored for upsert requests for assignment rule groups for other record types.</p> <p><b>NOTE:</b> You can optionally turn off the email notification for individual assignment rules for the Service Request record type, by setting the &lt;EmailNotification&gt; element on the rule to false. You cannot turn off the email notification for assignment rules for the Lead record type.</p> |
| <pre>&lt;data: AssignmentRuleGroup&gt;   .   .   .   &lt;data: ListOfRule&gt;   .   .   .   &lt;/data: ListOfRule&gt;   .   .   . &lt;/data: AssignmentRuleGroup&gt;</pre>  | <p>The &lt;ListOfRule&gt; section contains details of the rules for the rule group.</p>  |
| <pre>&lt;data: AssignmentRuleGroup&gt;   &lt;data: ListOfRule&gt;     &lt;data: AssignmentRule&gt;     .     .     .     &lt;/data: AssignmentRule&gt;   .   .   .   &lt;/data: ListOfRule&gt;   .   .   . &lt;/data: AssignmentRuleGroup&gt;</pre> | <p>The &lt;AssignmentRule&gt; section contains all of the top-level details for one rule in the rule group.</p> <p><b>NOTE:</b> The team assignment and criteria information for a rule is not contained in the assignment rule group XML file. The team assignment and criteria information for a rule is contained in the assignment rule XML file only.</p>   |

Table 66. Elements and Sections in the Assignment Rule Groups XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: AssignmentRuleGroup&gt; . . .   &lt;data: ListOfRule&gt;     &lt;data: AssignmentRule&gt;       &lt;data: RuleName&gt;SRRRule1&lt;/data: RuleName&gt;     . . .   &lt;/data: AssignmentRule&gt; . . . &lt;/data: ListOfRule&gt; &lt;/data: AssignmentRuleGroup&gt;</pre>                | <p>&lt;RuleName&gt; contains the name of the rule.</p>   |
| <pre>&lt;data: AssignmentRuleGroup&gt; . . .   &lt;data: ListOfRule&gt;     &lt;data: AssignmentRule&gt;       &lt;data: Order&gt;1&lt;/data: Order&gt;     . . .   &lt;/data: AssignmentRule&gt; . . . &lt;/data: ListOfRule&gt; &lt;/data: AssignmentRuleGroup&gt;</pre>                             | <p>&lt;Order&gt; is the order number for the assignment rule within the rule group. It determines the order in which the assignment manager invokes a sequence of assignment rules. The rule numbered 1 is invoked first, followed by the rule numbered 2, and so on.</p>  |
| <pre>&lt;data: AssignmentRuleGroup&gt; . . .   &lt;data: ListOfRule&gt;     &lt;data: AssignTo&gt;EXAMPLECOMPANY/TESTUSER2     &lt;/data: AssignTo&gt;     . . .   &lt;/data: AssignmentRule&gt; . . . &lt;/data: ListOfRule&gt; &lt;/data: AssignmentRuleGroup&gt;</pre>                              | <p>&lt;AssignTo&gt; contains the User Sign In ID of the user to whom the record is assigned if the criteria on the rule are met. When the criteria on one rule are met, the record is assigned and subsequent rules are ignored.</p>   |
| <pre>&lt;data: AssignmentRuleGroup&gt; . . .   &lt;data: ListOfRule&gt;     &lt;data: AssignmentRule&gt;       &lt;data: EmailNotification&gt;true       &lt;/data: EmailNotification&gt;     . . .   &lt;/data: AssignmentRule&gt; &lt;/data: ListOfRule&gt; &lt;/data: AssignmentRuleGroup&gt;</pre> | <p>The &lt;EmailNotification&gt; element specifies whether an email notification is sent to the user to whom the record is assigned (true) or an email notification is not sent to the user (false). The default value is true.</p> <p>The &lt;EmailNotification&gt; element can be set to false for assignment rules for the Service Request record type only. This element is ignored for upsert requests for assignment rules for other record types.</p> |
|  | <p><b>NOTE:</b> You cannot turn off the email notification for assignment rules for the Lead record type. No email notifications are sent for account and opportunity assignments, even if the &lt;EmailNotification&gt; element is set to true.</p>   |

Table 66. Elements and Sections in the Assignment Rule Groups XML File

| Element or Section  | Description   |
|---|---|
| <pre> &lt;data: AssignmentRuleGroup&gt; . . .   &lt;data: ListOfRule&gt;     &lt;data: AssignmentRule&gt;       . . .         &lt;data: AssignToTerritory/&gt;       . . .     &lt;/data: AssignmentRule&gt;   &lt;/data: ListOfRule&gt; &lt;/data: AssignmentRuleGroup&gt; </pre>  | <p>&lt;AssignToTerritory&gt; is the territory to which the record is assigned if the criteria on the rule are met.</p> <p>The &lt;AssignToTerritory&gt; element is applicable for assignment rules for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rules for other record types.</p>  |
| <pre> &lt;data: AssignmentRuleGroup&gt; . . .   &lt;data: ListOfRule&gt;     &lt;data: AssignmentRule&gt;       . . .         &lt;data: IncludeTeamAssignment&gt;false         &lt;/data: IncludeTeamAssignment&gt;       . . .     &lt;/data: AssignmentRule&gt;   &lt;/data: ListOfRule&gt; &lt;/data: AssignmentRuleGroup&gt; </pre> | <p>&lt;IncludeTeamAssignment&gt; specifies whether the team members are assigned to the record (true), or the team members are not assigned to the record (false).</p> <p>The &lt;IncludeTeamAssignment&gt; element can be set to true for assignment rules for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rules for other record types.</p>   |
| <pre> &lt;data: AssignmentRuleGroup&gt;   &lt;data: ListOfRule&gt;     &lt;data: AssignmentRule&gt;       &lt;data: IncludeRelatedContacts&gt;false       &lt;/data: IncludeRelatedContacts&gt;     &lt;/data: AssignmentRule&gt;   &lt;/data: ListOfRule&gt; &lt;/data: AssignmentRuleGroup&gt; </pre>                                 | <p>&lt;IncludeRelatedContacts&gt; specifies whether the contacts that are linked to the account are assigned to the specified account owner and territory if the rule criteria are met (true), or the contacts that are linked to the account are not assigned to the specified account owner and territory (false). The default value is false.</p> <p>The &lt;IncludeRelatedContacts&gt; element can be set to true for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p> |

Table 66. Elements and Sections in the Assignment Rule Groups XML File

| Element or Section  | Description   |
|---|---|
| <pre> &lt;data: AssignmentRuleGroup&gt; . . .   &lt;data: ListOfRule&gt;     &lt;data: AssignmentRule&gt;       .       .       .       &lt;data: IncludeRelatedOpportunities&gt;false     &lt;/data: IncludeRelatedOpportunities&gt;     &lt;/data: AssignmentRule&gt;       .       .     &lt;/data: ListOfRule&gt;   &lt;/data: AssignmentRuleGroup&gt; </pre> | <p>&lt;IncludeRelatedOpportunities&gt; specifies whether the opportunities that are linked to the account are assigned to the specified account owner and territory if the rule criteria are met (true), or the opportunities that are linked to the account are not assigned to the specified account owner and territory (false). The default value is false.</p> <p>The &lt;IncludeRelatedOpportunities&gt; element can be set to true for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p> |

## Elements and Sections in the Assignment Rules Output File

Table 67 describes the elements and sections in the assignment rules XML output file.

Table 67. Elements and Sections in the Assignment Rules XML File

| Element or Section  | Description   |
|---|---|
| <pre> &lt;data: AssignmentRule&gt; . . &lt;/data: AssignmentRule&gt; </pre>   | <p>The &lt;AssignmentRule&gt; section contains all of the details of one assignment rule.</p>           |
| <pre> &lt;data: AssignmentRule&gt;   &lt;data: RecordType&gt;Account   &lt;/data: RecordType&gt; . . &lt;/data: AssignmentRule&gt; </pre>               | <p>&lt;RecordType&gt; contains the system name of the record type (object), which never changes.</p>    |
| <pre> &lt;data: AssignmentRule&gt; .   &lt;data: RuleGroupName&gt;AcctTestGroup   &lt;/data: RuleGroupName&gt; . . &lt;/data: AssignmentRule&gt; </pre> | <p>&lt;RuleGroupName&gt; contains the name of the assignment rule group to which this rule belongs.</p> |
| <pre> &lt;data: AssignmentRule&gt; .   &lt;data: RuleName&gt;AcctRule1   &lt;/data: RuleName&gt; . . &lt;/data: AssignmentRule&gt; </pre>               | <p>&lt;RuleName&gt; contains the name of the rule.</p>  |

Table 67. Elements and Sections in the Assignment Rules XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: AssignmentRule&gt;   .   .   .   &lt;data: Order&gt;1&lt;/data: Order&gt;   .   . &lt;/data: AssignmentRule&gt;</pre>                                   | <p>&lt;Order&gt; is the order number for the assignment rule within the rule group. It determines the order in which the assignment manager invokes a sequence of assignment rules. The rule numbered 1 is invoked first, followed by the rule numbered 2, and so on.</p>  |
| <pre>&lt;data: AssignmentRule&gt;   .   .   .   &lt;data: AssignTo&gt;EXAMPLECOMPANY/TESTUSER2   &lt;/data: AssignTo&gt;   . &lt;/data: AssignmentRule&gt;</pre>       | <p>&lt;AssignTo&gt; contains the User Sign In ID of the user to whom the record is assigned if the criteria on the rule are met. When the criteria on one rule are met, the record is assigned and subsequent rules are ignored.</p>   |
| <pre>&lt;data: AssignmentRule&gt;   .   .   .   &lt;data: SendEmailNotification&gt;true   &lt;/data: SendEmailNotification&gt;   . &lt;/data: AssignmentRule&gt;</pre> | <p>The &lt;SendEmailNotification&gt; element specifies whether an email notification is sent to the user to whom the record is assigned (true) or an email notification is not sent to the user (false). The default value is true.</p> <p>The &lt;SendEmailNotification&gt; element can be set to false for assignment rules for the Service Request record type only. This element is ignored for upsert requests for assignment rules for other record types.</p> <p><b>NOTE:</b> You cannot turn off the email notification for assignment rules for the Lead record type. No email notifications are sent for account and opportunity assignments, even if the &lt;EmailNotification&gt; element is set to true</p> |
| <pre>&lt;data: AssignmentRule&gt;   .   .   .   &lt;data: AssignToTerritory/&gt;   . &lt;/data: AssignmentRule&gt;</pre>   | <p>&lt;AssignToTerritory&gt; is the territory to which the record is assigned if the criteria on the rule are met.</p> <p>The &lt;AssignToTerritory&gt; element is applicable for assignment rules in assignment rule groups for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rules for other record types.</p>   |

Table 67. Elements and Sections in the Assignment Rules XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: AssignmentRule&gt;   .   .   &lt;data: IncludeTeamAssignment&gt;true   &lt;/data: IncludeTeamAssignment&gt;   .   . &lt;/data: AssignmentRule&gt;</pre>             | <p><b>&lt;IncludeTeamAssignment&gt;</b> specifies whether the team members are assigned to the record (true), or the team members are not assigned to the record (false).</p> <p>This element can be set to true for assignment rules in assignment rules for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rules for other record types.</p>  |
| <pre>&lt;data: AssignmentRule&gt;   .   .   &lt;data: IncludeRelatedContacts&gt;true   &lt;/data: IncludeRelatedContacts&gt;   .   . &lt;/data: AssignmentRule&gt;</pre>           | <p><b>&lt;IncludeRelatedContacts&gt;</b> specifies whether the contacts that are linked to the account are assigned to the specified account owner and territory if the rule criteria are met (true), or the contacts that are linked to the account are not assigned to the specified account owner and territory (false). The default value is false.</p> <p>The <b>&lt;IncludeRelatedContacts&gt;</b> can be set to true for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p>                            |
| <pre>&lt;data: AssignmentRule&gt;   .   .   &lt;data: IncludeRelatedOpportunities&gt;true   &lt;/data: IncludeRelatedOpportunities&gt;   .   . &lt;/data: AssignmentRule&gt;</pre> | <p><b>&lt;IncludeRelatedOpportunities&gt;</b> specifies whether the opportunities that are linked to an account are assigned to the specified account owner and territory if the rule criteria are met (true), or the opportunities that are linked to the account are not assigned to the specified account owner and territory (false). The default value is false.</p> <p>The <b>&lt;IncludeRelatedOpportunities&gt;</b> element can be set to true for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p> |



Table 67. Elements and Sections in the Assignment Rules XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: AssignmentRule&gt;   &lt;data: ListofTeam&gt;     &lt;data: Team&gt;       . . .     &lt;/data: Team&gt;   &lt;/data: ListofTeam&gt; &lt;/data: AssignmentRule&gt;</pre>  | <p>The &lt;ListofTeam&gt; section and its &lt;Team&gt; child section contain details of the team members who share ownership of the assigned records.</p> <p>Team members can be added to assignment rules for the Account and Opportunity record types only. The &lt;ListofTeam&gt; section is ignored for upsert requests for assignment rules for other record types.</p>   |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListofTeam&gt;     &lt;data: Team&gt;       &lt;data: User&gt;Test User&lt;/data: User&gt;     &lt;/data: Team&gt;   &lt;/data: ListofTeam&gt;   . . . &lt;/data: ListofRuleCriteria&gt; &lt;/data: AssignmentRule&gt;</pre> | <p>&lt;User&gt; contains the first and last name of the user.</p>  |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListofTeam&gt;     &lt;data: Team&gt;       &lt;data: Role&gt;TestRole&lt;/data: Role&gt;     &lt;/data: Team&gt;   &lt;/data: ListofTeam&gt; &lt;/data: AssignmentRule&gt;</pre>  | <p>&lt;Role&gt; contains the role of the team member. This element is read-only and is ignored for upsert requests.</p>  |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListofTeam&gt;     &lt;data: Team&gt;       &lt;data: AccountAccess&gt;Edit&lt;/data: AccountAccess&gt;     &lt;/data: Team&gt;   &lt;/data: ListofTeam&gt; &lt;/data: AssignmentRule&gt;</pre>                              | <p>&lt;AccountAccess&gt; specifies the level of access that the user has to the account records that are assigned by this rule, and to the account records that are linked to the account. The &lt;AccountAccess&gt; element is applicable for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p>   |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListofTeam&gt;     &lt;data: Team&gt;       &lt;data: ContactAccess&gt;Full&lt;/data: ContactAccess&gt;     &lt;/data: Team&gt;   &lt;/data: ListofTeam&gt; &lt;/data: AssignmentRule&gt;</pre>                              | <p>&lt;ContactAccess&gt; specifies the level of access that the user has to the contact records that are linked to the account records that are assigned by this rule. The &lt;ContactAccess&gt; element is applicable for assignment rules for the Account record type only, and is applicable only if the &lt;IncludeRelatedContacts&gt; element is set to true for the rule. This element is ignored for upsert requests for assignment rules for other record types.</p> |

Table 67. Elements and Sections in the Assignment Rules XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListOfTeam&gt;     &lt;data: Team&gt;       . . .       &lt;data: OpportunityAccess&gt;ReadOnly     &lt;/data: OpportunityAccess&gt;     &lt;/data: Team&gt;   &lt;/data: ListOfTeam&gt; &lt;/data: AssignmentRule&gt;</pre>                   | <p>&lt;OpportunityAccess&gt; specifies the level of access that the user has to the opportunity records that are assigned by this rule, and to the opportunity records that are linked to the opportunity. In addition, if the &lt;IncludeRelatedOpportunities&gt; element is set to true for the rule, then the &lt;OpportunityAccess&gt; element specifies the level of access that the user has to the opportunity records that are linked to the account records that are assigned by this role.</p> |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListOfRuleCriteria&gt;   . . .   &lt;/data: ListOfRuleCriteria&gt; &lt;/data: AssignmentRule&gt;</pre>   | <p>The &lt;ListofRuleCriteria&gt; section contain details of the criteria for the assignment rule. You can specify multiple criteria for one rule.</p>   |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListOfRuleCriteria&gt;     &lt;/data: Rule&gt;   . . .   &lt;/data: Rule&gt;   &lt;/data: ListOfRuleCriteria&gt; &lt;/data: AssignmentRule&gt;</pre>   | <p>The &lt;Rule&gt; section contains the details of one rule criterion.</p>  |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListOfRuleCriteria&gt;     &lt;/data: Rule&gt;       &lt;data: Field&gt;Account Type&lt;/data: Field&gt;   . . .   &lt;/data: Rule&gt;   &lt;/data: ListOfRuleCriteria&gt; &lt;/data: AssignmentRule&gt;</pre>                                 | <p>&lt;Field&gt; contains the name of the field that is to be evaluated.</p>   |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListOfRuleCriteria&gt;     &lt;/data: Rule&gt;       . . .       &lt;data: Condition&gt;Contains all values     &lt;/data: Condition&gt;   . . .   &lt;/data: Rule&gt;   &lt;/data: ListOfRuleCriteria&gt; &lt;/data: AssignmentRule&gt;</pre> | <p>&lt;Condition&gt; specifies the condition that must be satisfied to meet the criterion.</p>   |
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListOfRuleCriteria&gt;     &lt;/data: Rule&gt;       . . .       &lt;data: Value&gt;Competitor&lt;/data: Value&gt;   . . .   &lt;/data: Rule&gt;   &lt;/data: ListOfRuleCriteria&gt; &lt;/data: AssignmentRule&gt;</pre>                       | <p>&lt;Value&gt; contains the value for the criterion.</p>   |

Table 67. Elements and Sections in the Assignment Rules XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: AssignmentRule&gt;   . . .   &lt;data: ListOfRuleCriteria&gt;     &lt;/data: Rule&gt;   . . .   &lt;data: Sequence&gt;1000&lt;/data: Sequence&gt;   &lt;/data: Rule&gt; &lt;/data: ListOfRuleCriteria&gt; &lt;/data: AssignmentRule&gt;</pre> | <p>&lt;Sequence&gt; specifies the sequence of the criterion on the rule. This field is read-only and is ignored for upsert requests.</p> |

## Migrating Assignment Rule Groups

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with assignment rule groups:

- [“Extracting a Single Assignment Rule Group” on page 211](#)
- [“Extracting All Assignment Rule Groups for a Single Object” on page 212](#)
- [“Extracting All Assignment Rule Groups” on page 213](#)
- [“Updating or Inserting an Assignment Rule Group” on page 213](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Single Assignment Rule Group

This topic describes how to extract a single assignment rule group from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
migration tool install/repository/AssignmentRuleGroup/RecordType/
AssignmentRuleGroupName.xml
```

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single assignment rule group:

```
migrationtool -u UserID -s ServerURL Read AssignmentRuleGroup [SystemNameOfObject]
RuleGroupName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rule groups applies, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#). If you do not specify the record type, then you must specify an empty value for the *SystemNameOfObject* parameter. An empty value is specified as a set of double quotation marks ("").

**NOTE:** Assignment rule groups are supported only for the Account, Lead, Opportunity, and Service Request record types.

- *RuleGroupName* is the name of the rule group that you want to extract.

### Example of Extracting a Single Assignment Rule Group

The following is an example of extracting a single assignment rule group:

```
mi grati ontool -u UserID -s ServerURL Read Assi gnmentRul eGroup Account "My Account  
Assi gnment Rul e Group"
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the rule group name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rule Groups for a Single Object

This topic describes how to extract all assignment rule groups for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rule groups for a single object:

```
mi grati ontool -u UserID -s ServerURL Read Assi gnmentRul eGroup SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rule groups applies, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** Assignment rule groups are supported only for the Account, Lead, Opportunity, and Service Request record types.

## Example of Extracting All Assignment Rule Groups for a Single Object

The following is an example of extracting all assignment rule groups for a single object:

```
mi grati ontool -u UserID -s ServerURL Read Assi gnmentRul eGroup Account
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rule Groups

This topic describes how to extract all assignment rule groups from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rule groups:

```
mi grati ontool -u UserID -s ServerURL ReadAl l Assi gnmentRul eGroup
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting an Assignment Rule Group

This topic describes how to use the Upsert command to update an assignment rule group (if it exists) or insert an assignment rule group (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

### About the Upsert Operation

The Upsert command inserts or updates an assignment rule group based on the following user key:

- `<RecordType>` and `<RuleGroupName>`

Oracle CRM On Demand attempts to locate the rule group based on the user key. If a match is located, then the rule group is updated. If Oracle CRM On Demand cannot locate a rule group based on the user key, then a new rule group is created.

For the rules specified in the input file for the assignment rule group (if any rules are specified), the Upsert command inserts or updates the assignment rules based on either of the following user keys:

- **User key 1.** <RuleGroupName> and <RecordType> and <RuleName>.
- **User key 2.** <RuleGroupName> and <RecordType> and <Order>.

The <RuleName> and <Order> elements are child elements of the <AssignmentRule> element.

When you use the `Upsert AssignmentRuleGroup` command to update an existing rule group, Oracle CRM On Demand attempts to locate the rules that are specified in the input file based on the user keys. If a match is located, then the rule is updated. If a match is located for both user keys, then the match located for user key 1 takes precedence. If Oracle CRM On Demand cannot locate an assignment rule based on the user keys, then a new rule is created.

When you run the `Upsert` command, if the assignment rule group already exists, then the existing assignment rules in the rule group are updated, and new assignment rules for the rule group are inserted. Existing rules in the rule group that are not included in the input file are not affected.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update an assignment rule group (if it exists) or to insert a new assignment rule group (if it does not exist):

```
migrationtool -u UserID -s ServerURL Upsert AssignmentRuleGroup  
AssignmentRuleGroupXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *AssignmentRuleGroupXML* is the fully qualified path name of the assignment rule group XML file, for example:

```
C:\My Files\MyAssignmentRuleGroup.xml
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting an Assignment Rule Group

The following is an example of updating an assignment rule group (if it exists) or inserting an assignment rule group (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert AssignmentRuleGroup "C:\Oracle Migration  
Tool On Demand\repository\AssignmentRuleGroup\Account\My AssignmentRuleGroup.xml "
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.

## Migrating Assignment Rules

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with assignment rules:

- “Extracting a Single Assignment Rule” on page 215
- “Extracting All Assignment Rules for a Single Rule Group” on page 216
- “Extracting All Assignment Rules for a Single Object” on page 217
- “Extracting All Assignment Rules” on page 217
- “Updating or Inserting an Assignment Rule” on page 218

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Single Assignment Rule

This topic describes how to extract a single assignment rule from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
migration tool install/repository/AssignmentRule/RecordType/AssignmentRuleGroupName/AssignmentRuleName.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific assignment rule:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule [SystemNameOfObject] [RuleGroupName] RuleName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rule applies, for example, Account. The system names for the record types are listed in “[System Names for Record Types](#)” on page 411. If you do not specify the record type, then you must specify an empty value for the *SystemNameOfObject* parameter. An empty value is specified as a set of double quotation marks (“”).

**NOTE:** Assignment rule groups are supported only for the Account, Lead, Opportunity, and Service Request record types.

- *RuleGroupName* is the name of the rule group to which the rule belongs. If you do not specify the rule group name, then you must specify an empty value for the *RuleGroupName* parameter. An empty value is specified as a set of double quotation marks (“”).

- *RuleName* is the name of the rule that you want to extract.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Assignment Rule

The following is an example of extracting a specific assignment rule:

```
mi grati ontool -u UserID -s ServerURL Read Assi gnmentRul e Account "My Assi gnment Rul e Group" MyAssi gnmentRul e
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the assignment rule group name contains spaces, then it must be enclosed with quotation marks, and if the assignment rule name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rules for a Single Rule Group

This topic describes how to extract all assignment rules for a single rule group from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rules for a single rule group:

```
mi grati ontool -u UserID -s ServerURL Read Assi gnmentRul e [SystemNameOfObject]  
Rul eGroupName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rules apply, for example, Account. The system names for the record types are listed in ["System Names for Record Types" on page 411](#). If you do not specify the record type, then you must specify an empty value for the *SystemNameOfObect* parameter. An empty value is specified as a set of double quotation marks ("").
- *RuleGroupName* is the name of the rule group to which the rule belongs.

**NOTE:** Assignment rules are supported only for the Account, Lead, Opportunity, and Service Request record types.

### Example of Extracting All Assignment Rules for a Single Rule Group

The following is an example of extracting all assignment rules for a single rule group:



```
mi grati ontool -u UserID -s ServerURL Read Assi gnmentRul e Account "My Assi gnment Rul e Group"
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the assignment rule group name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rules for a Single Object

This topic describes how to extract all assignment rules for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rules for a single object:

```
mi grati ontool -u UserID -s ServerURL Read Assi gnmentRul e SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rules apply, for example, Account. The system names for the record types are listed in ["System Names for Record Types" on page 411](#).

**NOTE:** Assignment rules are supported only for the Account, Lead, Opportunity, and Service Request record types.

### Example of Extracting All Assignment Rules for a Single Object

The following is an example of extracting all assignment rules for a single object:

```
mi grati ontool -u UserID -s ServerURL Read Assi gnmentRul e Account
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rules

This topic describes how to extract all assignment rules from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rules:

```
mi grati ontool -u UserID -s ServerURL ReadAll Assignme n tRul e
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting an Assignment Rule

This topic describes how to use the Upsert command to update an assignment rule (if it exists) or insert an assignment rule (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

### About the Upsert Operation

The Upsert command updates an assignment rule based on either of the following user keys:

- **User key 1.** <RuleGroupName> and <RecordType> and <RuleName>.
- **User key 2.** <RuleGroupName> and <RecordType> and <Order>.

Oracle CRM On Demand attempts to locate the rules that are specified in the input file based on the user keys. If a match is located, then the rule is updated. If a match is located for both user keys, then the match located for user key 1 takes precedence. If Oracle CRM On Demand cannot locate an assignment rule based on the user keys, then a new rule is created.

For each rule, the Upsert command inserts or updates rule criteria and team information based on the following user keys:

- **Rule criteria.** The <Sequence> element, which is a child element of the <ListofRuleCriteria> element.
- **Team information.** The <User> element, which is a child element of the <Team> element.

**NOTE:** You must migrate the assignment rule group to which an assignment rule belongs before you migrate the assignment rule.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific assignment rule (if it exists) or to insert an assignment rule (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert Assignme n tRul e Assi gnme n tRul eXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *AssignmentRuleXML* is the fully qualified path name of the assignment rule XML file, for example:  
C:\My Files\My Assignment Rule.xml

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting an Assignment Rule

The following is an example of updating an assignment rule (if it exists) or inserting an assignment rule (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert AssignmentRule "C:\Oracle Migration Tool  
On Demand\repository\AssignmentRule\Account\MyAccountRuleGroup\My  
AssignmentRule1.xml"
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.



# 23 Migrating List Access and Order Layouts

This chapter describes how to migrate your list access and order layouts using the Oracle Migration Tool On Demand client. It contains the following topics:

- [List Access and Order Layouts on page 221](#)
- [Privileges Required for Migrating List Access and Order Layouts on page 222](#)
- [Elements and Sections in the List Access and Order Layout XML Output File on page 222](#)
- [Migrating List Access and Order Layouts on page 223](#)

## List Access and Order Layouts

For many record types (objects), you can specify which lists of records of that type are available for each role, and the order in which the lists are displayed on the record type's Homepage. For each record type, you can create one list access and order layout for each role. For more information about list access and order layouts, see *Oracle CRM On Demand Online Help*.

[Table 68](#) describes the Oracle Migration Tool On Demand client commands used with list access and order layouts. These commands are case sensitive.

Table 68. Commands Used with List Access and Order Layouts in Oracle Migration Tool On Demand

| Command  | Description   |
|--|---|
| <code>Read ListAccessAndOrder</code><br><i>SystemNameOfObject RoleName</i> | <p>This command extracts the list access and order layouts for a specific record type (object), for one role. The parameters for the command are as follows:</p> <ul style="list-style-type: none"><li>■ <i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">"System Names for Record Types" on page 411</a>.</li><li>■ <i>RoleName</i> is the language-independent name of the role. For a custom role, the language-independent name of the role is generated from the role name provided by the user who creates the role.</li></ul> <p><b>NOTE:</b> You can determine the system names of the roles by extracting the roles, as described in <a href="#">"Extracting All Roles" on page 167</a>.</p> |
| <code>ReadAll ListAccessAndOrder</code>                                    | <p>This command extracts the list access and order layouts for all record types, and for all roles.</p>   |

Table 68. Commands Used with List Access and Order Layouts in Oracle Migration Tool On Demand

| Command   | Description   |
|---|---|
| Upsert ListAccessAndOrder<br><i>ListAccessAndOrderXML</i> | This command updates or inserts a list access and order layout for one record type, for one role. |

## Privileges Required for Migrating List Access and Order Layouts

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access and Manage Roles and Access.
- For the Upsert command: Enable Web Services Access, Customize Application, Manage Public Lists, Manage Roles and Access, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the List Access and Order Layout XML Output File

Table 69 describes the elements and sections in the list access and order layout XML output file.

Table 69. Elements and Sections in the List Access and Order Layout XML File

| Element or Section   | Description  |
|--|--|
| <data: ListAccessAndOrder><br>.....<br></data: ListAccessAndOrder>   | The <ListAccessAndOrder> section contains all of the information for one list access and order layout for one record type, for one role. |
| <data: ListAccessAndOrder><br><data: ObjectName>Account<br></data: ObjectName><br>.....<br></data: ListAccessAndOrder>       | <ObjectName> contains the system name of the record type (object), which never changes.  |
| <data: ListAccessAndOrder><br>.....<br><data: RoleName>TestRole<br></data: RoleName><br>.....<br></data: ListAccessAndOrder> | <RoleName> contains the language-independent name of the role.   |

Table 69. Elements and Sections in the List Access and Order Layout XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: Li stAccessAndOrder&gt; . . . &lt;data: Modi fi edBy&gt;AB User 10/26/2012 10: 12: 40&lt;/data: Modi fi edBy&gt; . . . &lt;/data: Li stAccessAndOrder&gt;</pre>  | <p>&lt;ModifiedBy&gt; contains the username of the user who last updated the layout, and the date and time the layout was last updated.</p>  |
| <pre>&lt;data: Li stAccessAndOrder&gt; . . .   &lt;data: Li stOfLi stAccessAndOrderLi st&gt;     &lt;data: Li stAccessAndOrderLi st&gt;       &lt;data: Li stName&gt;My Acti ve Accounts       &lt;/data: Li stName&gt;       &lt;data: Order&gt;2&lt;/data: Order&gt;     . . .     &lt;data: Li stAccessAndOrderLi st     &lt;/data: Li stOfLi stAccessAndOrderLi st&gt;   . . . &lt;/data: Li stAccessAndOrder&gt;</pre> | <p>The &lt;ListOfListAccessAndOrderList&gt; contains details of the list layout for one record type, for one role. It includes the following elements:</p> <ul style="list-style-type: none"> <li>■ &lt;ListName&gt; contains the name of the list</li> <li>■ &lt;Order&gt; indicates the order of the list within the layout, as follows: <ul style="list-style-type: none"> <li>■ A value of 2 or higher indicates that the list appears in the Show in Short List section. The order number also indicates the position of the list within the short list of lists. The list with the lowest order number appears at the top of the short list of lists.</li> <li>■ A value of -1 indicates that the list appears in the Lists Available for this Role section.</li> <li>■ A value of -2 indicates that the list appears in the All Lists section.</li> </ul> </li> </ul> |

## Migrating List Access and Order Layouts

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate list access and order layouts:

- [“Extracting List Access and Order Layouts for a Single Object and Role” on page 224](#)
- [“Extracting List Access and Order Layouts for All Objects and Roles” on page 224](#)
- [“Updating or Inserting List Access and Order Layouts \(Upsert\)” on page 225](#)

## Extracting List Access and Order Layouts for a Single Object and Role

This topic describes how to extract the list access and order layout for a single object and role from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follow:

```
migration tool install/repository/ListAccessAndOrder/RecordType/
RoleName.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the list access and order layout for a single object and role:

```
migrationtool -u UserID -s ServerURL Read ListAccessAndOrder SystemNameOfObject
RoleName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the list access and order layout applies, for example, Account. The system names for the record types are listed in ["System Names for Record Types"](#) on page 411.
- *RoleName* is the language-independent name of the role.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting List Access and Order Layouts for a Single Object and Role

The following is an example of extracting the list access and order layout for single object and role:

```
migrationtool -u UserID -s ServerURL Read ListAccessAndOrder Account ExpertRole
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the role name contains spaces, then it must be enclosed with quotation marks.

## Extracting List Access and Order Layouts for All Objects and Roles

This topic describes how to extract the list access and order layouts for all objects, for all roles from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.



### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the list access and order layouts for all objects, for all roles:

```
mi grati ontool -u UserID -s ServerURL ReadAll ListAccessAndOrder
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting List Access and Order Layouts (Upsert)

This topic describes how to update a list access and order layout for a single object and role (if the layout already exists), or insert a layout (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The Upsert command inserts or updates list access and order layouts based on the following user key:

- `<RoleName>` and `<ObjectName>`

Oracle CRM On Demand attempts to locate the list access and order layout specified in the input file based on the user key. If a match is located, then the layout is updated. If Oracle CRM On Demand cannot locate a list access and order layout based on the user key, then a new layout is created for the specified record type and role.

If the layout includes public lists that were created and assigned in the source environment, and if those lists do not exist in the target environment where you are updating and inserting the list access and order layouts, then those lists are not included in the layout in the target environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update the list access and order layout for one object, for one role:

```
mi grati ontool -u UserID -s ServerURL Upsert ListAccessAndOrder ListAccessAndOrderXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ListAccessAndOrderXML* is the fully qualified path name of the list access and order layout XML file, for example:

C:\My Files\ExpertRole.xml

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert ListAccessAndOrder "C:\My Files\ExpertRole.xml "
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting a List Access and Order Layout

The following is an example of updating a list access and order layout (if it exists) or inserting the list access and order layout layout (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert ListAccessAndOrder "C:\Oracle Migration Tool On Demand\repository>ListAccessAndOrder\Account\ExpertRole.xml "
```

**NOTE:** Quotation marks are required only if the fully qualified path name name contains spaces.

# 24 Migrating Role Associations for Report Folders

This chapter describes how to migrate the associations between roles and report folders using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Role Associations for Report Folders on page 227](#)
- [Privileges Required for Migrating Role Associations for Report Folders Information on page 228](#)
- [Elements and Sections in the Role Associations for Report Folders XML Output File on page 228](#)
- [Migrating Role Associations for Report Folders on page 230](#)

## Role Associations for Report Folders

Users can store the reports that they create in report folders. Report folders can be created in a user's personal area and in the company-wide shared folder. You can limit access to the folders in the company-wide shared folder by associating roles with the folders. After you associate one or more roles with a folder, only users with those roles can access the folder. If no role is associated with a folder, then all users have access to the folder by default. A subfolder automatically inherits the role associations of its parent folder, but you can change the role associations for the subfolder. For more information about setting up report folders, see *Oracle CRM On Demand Online Help*.

You can use the Oracle Migration Tool On Demand client to extract and update the associations between roles and existing shared folders. However, you cannot use the Oracle Migration Tool On Demand client to create report folders or subfolders.

[Table 70](#) describes the Oracle Migration Tool On Demand client commands used with role associations for report folders. These commands are case sensitive.

Table 70. Commands Used with Role Associations for Report Folders in Oracle Migration Tool On Demand

| Command                             | Description  |
|-------------------------------------|--|
| Read ReportFolder <i>FolderPath</i> | <p>This command extracts the details of a specified folder and its role associations. The <i>FolderPath</i> parameter must specify the full path for the folder. The folder path for every folder in the company-wide shared folder starts with <i>/shared/Company Analyses</i>, and this string must be included in the path.</p> <p>The extracted information includes the name of the folder's parent folder and the names of any subfolders.</p> |
| ReadAll ReportFolder                | <p>This command extracts the details of all report folders and their role associations.</p>  |

Table 70. Commands Used with Role Associations for Report Folders in Oracle Migration Tool On Demand

| Command                                    | Description   |
|--|---|
| Upsert ReportFolder <i>ReportFolderXML</i> | <p>This command updates the role associations for a report folder.</p> <p><b>NOTE:</b> You cannot use the Upsert command to create new folders or subfolders. You can use the Upsert command only to add role associations and to set the access level for the roles.</p> |

## Privileges Required for Migrating Role Associations for Report Folders Information

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access and Manage Content.
- For the Upsert command: Enable Web Services Access and Manage Content.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Role Associations for Report Folders XML Output File

Table 71 describes the elements and sections in the role associations for report folders XML output file.

Table 71. Elements and Sections in the Role Associations for Report Folders XML File

| Element or Section   | Description  |
|--|--|
| <pre>&lt;data: ReportFolder&gt; ... &lt;/data: ReportFolder&gt;</pre>  | The <ReportFolder> section contains all of the information for a single folder and its subfolders. |
| <pre>&lt;data: ReportFolder&gt;   &lt;data: Path&gt;/shared/Company Analyses/   Test Folder&lt;/data: Path&gt; ... &lt;/data: ReportFolder&gt;</pre> | <Path> contains the path for the folder.   |

Table 71. Elements and Sections in the Role Associations for Report Folders XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: ReportFolder&gt;   . . .   &lt;data: FolderName&gt;Test Folder   &lt;/data: FolderName&gt;   . . . &lt;/data: ReportFolder&gt;</pre>   | <p>&lt;FolderName&gt; contains the name of the folder.</p>  |
| <pre>&lt;data: ReportFolder&gt;   . . .   &lt;data: Description&gt;This is my test   folder&lt;/data: Description&gt;   . . . &lt;/data: ReportFolder&gt;</pre>   | <p>&lt;Description&gt; contains the description of the folder, if a description exists.</p>   |
| <pre>&lt;data: ReportFolder&gt;   . . .   &lt;data: ParentFolder&gt;Company Analyses   &lt;/data: ParentFolder&gt;   . . . &lt;/data: ReportFolder&gt;</pre>  | <p>&lt;ParentFolder&gt; contains the name of the parent folder. If the folder is created directly in the company-wide shared folder, then the name of the parent folder is Company Analyses.</p>                              |
| <pre>data: ReportFolder&gt;   . . .   &lt;data: ListOfSubFolders&gt;   &lt;data: SubFolder&gt;   &lt;data: Path&gt;/shared/Company Analyses/   Test Folder/Test Folder A&lt;/data: Path&gt;   &lt;data: FolderName&gt;Test Folder A   &lt;/data: FolderName&gt;   &lt;data: Description/&gt;   &lt;/data: SubFolder&gt;   . . . &lt;/data: ReportFolder&gt;</pre> | <p>The &lt;ListOfSubFolders&gt; section contains details of the subfolders under the current folder, if any exist. It includes the &lt;Path&gt;, &lt;FolderName&gt;, and &lt;Description&gt; elements for each subfolder.</p> |
| <pre>data: ReportFolder&gt;   . . .   &lt;data: ListOfAssociatedRoles&gt;   . . .   &lt;/data: ListOfAssociatedRoles&gt; &lt;/data: ReportFolder&gt;</pre>  | <p>The &lt;ListOfAssociatedRoles&gt; section contains details of the role associations for the folder.</p>  |

Table 71. Elements and Sections in the Role Associations for Report Folders XML File

| Element or Section   | Description   |
|--|---|
| <pre> data: ReportFolder&gt;   . . .   &lt;data: ListOfAssociatedRoles&gt;     &lt;data: AssociatedRole&gt;       &lt;data: RoleName&gt;User Role2       &lt;/data: RoleName&gt;       &lt;data: AccessLevel&gt;Change/Delete       &lt;/data: AccessLevel&gt;     &lt;/data: AssociatedRole&gt;     . . .   &lt;/data: ListOfAssociatedRoles&gt; &lt;/data: ReportFolder&gt;                     </pre> | <p>The &lt;AssociatedRole&gt; section contains details of a single role association, including the following:</p> <ul style="list-style-type: none"> <li>■ &lt;RoleName&gt; is the name of the role.</li> <li>■ &lt;AccessLevel&gt; is the level of access that is given to this role for this folder.</li> </ul> |

## Migrating Role Associations for Report Folders

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate role associations for report folders:

- [“Extracting Role Associations for a Single Report Folder” on page 230](#)
- [“Extracting Role Associations for All Report Folders” on page 231](#)
- [“Updating Role Associations for Report Folders” on page 231](#)

### Extracting Role Associations for a Single Report Folder

This topic describes how to extract the role associations for a single report folder from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the role associations for a single report folder:

```
migrationtool -u UserID -s ServerURL Read ReportFolder FolderPath
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

■ *FolderPath* is the path for the folder for which you want to extract the role associations.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Role Associations for a Single Report Folder

The following is an example of extracting the role associations for a single report folder. In this example, the folder named Test Folder A is a subfolder of the folder named Test Folder:

```
mi grati ontol -u UserID -s ServerURL Read ReportFol der "shared/Company Anal yses/Test
Folder/Test Fol der A"
```

**NOTE:** Quotation marks are always required for the folder path, because the path for the root folder (shared/Company Analyses) contains a space.

## Extracting Role Associations for All Report Folders

This topic describes how to extract the role associations for all report folders from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the role associations for all report folders:

```
mi grati ontol -u UserID -s ServerURL ReadAll ReportFol der
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating Role Associations for Report Folders

This topic describes how to update the role associations for report folders on your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update the role associations for report folders:

```
mi grati ontool -u UserID -s ServerURL Upsert ReportFolder ReportFolderXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ReportFolderXML* is the fully qualified path name of the role associations for the report folder XML file, for example:

```
C:\My Files\Test Folder.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
mi grati ontool -u UserID -s ServerURL Upsert ReportFolder "C:\My Files\Test Folder.xml"
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting the Role Associations for a Report Folder

The following is an example of updating the role associations for a report folder in your Oracle CRM On Demand server:

```
mi grati ontool -u UserID -s ServerURL Upsert ReportFolder "C:\Oracle Migration Tool On Demand\repository\ReportFolder\MyFolder.xml"
```

**NOTE:** Quotation marks are required only if the path or file name contains spaces.



# 25 Migrating Custom HTML Head Tag Additions

This chapter describes how to migrate your custom HTML head tag additions. It contains the following topics:

- [Custom HTML Head Tag Additions on page 233](#)
- [Privileges Required for Migrating Custom HTML Head Tag Additions on page 233](#)
- [Elements in the Custom HTML Head Tag Additions XML Output File on page 234](#)
- [Migrating Custom HTML Head Tag Additions on page 234](#)

## Custom HTML Head Tag Additions

*Custom HTML head tag additions* are custom `<script>` elements that you can add to the HTML `<head>` element of the Oracle CRM On Demand pages. For example, the `<script>` elements can contain custom JavaScript code that creates custom buttons on your pages. Your custom code can also reference JavaScript files that were uploaded through client side extensions or external JavaScript files. HTML head tag additions apply to all pages in Oracle CRM On Demand.

[Table 72](#) describes the Oracle Migration Tool On Demand client commands used with custom HTML head tag additions. These commands are case sensitive.

Table 72. Commands Used with Custom HTML Head Tag Additions in Oracle Migration Tool On Demand

| Command  | Description  |
|--|--|
| <code>ReadForValue CustomHTMLHeadTag</code>                | This command exports the custom HTML head tag additions for the Oracle CRM On Demand pages.  |
| <code>Upsert CustomHTMLHeadTag CustomHTMLHeadTagXML</code> | This command inserts the custom HTML head tag additions that are specified in the XML file. If any custom HTML head tag additions exist in the target environment, then they are overwritten by the content of the input file. |

## Privileges Required for Migrating Custom HTML Head Tag Additions

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `ReadForValue` command: Enable Web Services Access, and Upload Client Side Extensions and Manage Custom HTML Head Tag.

- For the Upsert command: Enable Web Services Access and Upload Client Side Extensions and Manage Custom HTML Head Tag.

## Elements in the Custom HTML Head Tag Additions XML Output File

Table 73 describes the elements in the custom HTML head tag additions XML output file.

Table 73. Elements in the Custom HTML Head Tag Additions XML File

| Element  | Description  |
|--|--|
| <code>&lt;data:HTMLHeadAdditions&gt;&lt;/data:HTMLHeadAdditions&gt;</code> | This element contains the HTML head tag additions. |

## Migrating Custom HTML Head Tag Additions

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate custom HTML head tag additions:

- [“Extracting Custom HTML Head Tag Additions” on page 234](#)
- [“Updating or Inserting Custom HTML Head Tag Additions” on page 235](#)

## Extracting Custom HTML Head Tag Additions

This topic describes how to extract the custom HTML head tag additions from the HTML head tag.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the custom HTML head tag additions:

```
mi grati ontool -u UserID -s ServerURL ReadForValue CustomHTMLHeadTag
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting Custom HTML Head Tag Additions

This topic describes how to update or insert custom HTML head tag additions for the Oracle CRM On Demand pages in your Oracle CRM On Demand environment (customer test environment or production). If any custom HTML head tag additions exist, then they are overwritten by the content of the input file.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update or insert custom HTML head tag additions in the HTML <head> element of the Oracle CRM On Demand pages:

```
mi migrationtool -u UserID -s ServerURL Upsert CustomHTMLHeadTag CustomHTMLHeadTagXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *CustomHTMLHeadTagXML* is the fully qualified path name of the custom HTML head tag additions XML file, for example:

```
C:\MyFiles\CustomHTMLHeadTag.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
mi migrationtool -u UserID -s ServerURL Upsert CustomHTMLHeadTag "C:\MyFiles\CustomHTMLHeadTag.xml "
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.



# 26 Migrating Field Audit Setup Information

This chapter describes how to migrate your field audit setup information using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Field Audit Setup on page 237](#)
- [Privileges Required for Migrating Field Audit Setup Information on page 238](#)
- [Elements and Sections in the Field Audit Setup XML Output File on page 238](#)
- [Migrating Field Audit Setup Information on page 239](#)

## Field Audit Setup

The audit trail functionality allows your company to track changes to certain fields on records, and to track the creation, deletion, and restoration of records. The *field audit setup* for a record type determines which fields are audited for that record type, and whether the creation, deletion, and restoration of records of that type are tracked. For some record types, certain fields are audited by default. For other record types, no fields are audited by default. Your administrator can configure the audit trail for each record type that supports the audit trail functionality. For more information about field audit setup and the record types that can be audited, see *Oracle CRM On Demand Online Help*.

[Table 74](#) describes the Oracle Migration Tool On Demand client commands used with field audit setup. These commands are case sensitive.

Table 74. Commands Used with Field Audit Setup in Oracle Migration Tool On Demand

| Command  | Description  |
|--|--|
| <code>Read FieldAuditSetup<br/>SystemNameOfObject</code>   | This command extracts the field audit setup information for a specific record type (object).<br><br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">"System Names for Record Types" on page 411</a> . |
| <code>ReadAll FieldAuditSetup</code>                       | This command extracts the field audit setup information for all objects.   |
| <code>Upsert FieldAuditSetup<br/>FieldAuditSetupXML</code> | This command updates or inserts the field audit setup information for an object.   |

## Privileges Required for Migrating Field Audit Setup Information

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access, Administer Field Audit, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.
- For the Upsert command: Enable Web Services Access, Administer Field Audit, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Field Audit Setup XML Output File

Table 75 describes the elements and sections in the field audit setup XML output file.

Table 75. Elements and Sections in the Field Audit Setup XML File

| Element or Section  | Description   |
|---|---|
| <code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>   | <code>&lt;ObjectName&gt;</code> contains the system name of the record type (object), which never changes.  |
| <code>&lt;data:AuditRecordCreation&gt;true&lt;/data:AuditRecordCreation&gt;</code>  | <code>&lt;AuditRecordCreation&gt;</code> specifies whether the creation of records of this record type is tracked (true) or is not tracked (false).   |
| <code>&lt;data:AuditRecordDeletionOrRestore&gt;true&lt;/data:AuditRecordDeletionOrRestore&gt;</code>  | <code>&lt;AuditRecordDeletionOrRestore&gt;</code> specifies whether the deletion and restoration of records of this record type are tracked (true) or are not tracked (false).  |
| <code>&lt;data:ListOfFields&gt;</code><br><code>&lt;data:Name&gt;Furigana Name&lt;/data:Name&gt;</code><br><code>&lt;data:IsAudited&gt;true&lt;/data:IsAudited&gt;</code><br>.<br>.<br><code>&lt;/data:Field&gt;</code> | <code>&lt;ListOfFields&gt;</code> lists the fields that can be audited for the record type. For each field, the following elements are specified: <ul style="list-style-type: none"> <li>■ <code>&lt;Name&gt;</code> contains the system name of the field, which never changes.</li> <li>■ <code>&lt;IsAudited&gt;</code> specifies whether changes to the field are tracked (true) or are not tracked (false).</li> </ul> |

# Migrating Field Audit Setup Information

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate field audit setup information:

- [“Extracting Field Audit Setup Information for a Single Object” on page 239](#)
- [“Extracting Field Audit Setup Information for All Objects” on page 240](#)
- [“Updating Field Audit Setup Information \(Upsert\)” on page 240](#)

## Extracting Field Audit Setup Information for a Single Object

This topic describes how to extract the field audit setup information for a single object from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the field audit setup information for a single object:

```
mi grati ontool -u UserID -s ServerURL Read Fi el dAudi tSetUp SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) whose field audit setup information you want to extract, for example, Account Contact. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Field Audit Setup Information for a Single Object

The following is an example of extracting the field audit setup information for the Account object:

```
mi grati ontool -u UserID -s ServerURL Read Fi el dAudi tSetUp Account
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting Field Audit Setup Information for All Objects

This topic describes how to extract the field audit setup information for all objects from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the field audit setup for all objects:

```
mi grati ontool -u UserID -s ServerURL ReadAll FieldAuditSetup
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating Field Audit Setup Information (Upsert)

This topic describes how to update the field audit setup information for a single object on your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update the field audit setup information for an object:

```
mi grati ontool -u UserID -s ServerURL Upsert FieldAuditSetup FieldAuditSetupXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *FieldAuditSetupXML* is the fully qualified path name of the field audit setup XML file, for example:

```
C:\My Files\Account.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:



```
migrationtool -u UserID -s ServerURL Upsert FieldAuditSetup "C:\MyFiles\Account.xml"
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.



# 27 Migrating Sales Categories

This chapter describes how to migrate your sales categories using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Sales Categories on page 243](#)
- [Privileges Required for Migrating Sales Categories on page 243](#)
- [Elements and Sections in the Sales Categories XML Output File on page 244](#)
- [Migrating Sales Categories on page 244](#)

## Sales Categories

*Sales categories* are used to organize sales stages from different sales processes into groups. You can run reports against the sales categories.

[Table 76](#) describes the Oracle Migration Tool On Demand client commands used with sales categories. These commands are case sensitive.

Table 76. Commands Used with Sales Categories in Oracle Migration Tool On Demand

| Command                                      | Description  |
|--|--|
| Read SalesCategory <i>Order</i>              | This command extracts a sales category. The <i>Order</i> parameter specifies the order number of the sales category. |
| ReadAll SalesCategory                        | This command extracts all sales categories.  |
| Upsert SalesCategory <i>SalesCategoryXML</i> | This command updates or inserts the sales categories specified in the XML file.                                      |

## Privileges Required for Migrating Sales Categories

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access and Manage Data Rules - Manage Sales Stage Definition.
- For the Upsert command: Enable Web Services Access and Manage Data Rules - Manage Sales Stage Definition.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Sales Categories XML Output File

Table 77 describes the elements and sections in the sales categories XML output file.

Table 77. Elements and Sections in the Sales Categories XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: SalesCategory&gt;   &lt;data: StageCategory&gt;[Test Sales Category] &lt;/data: StageCategory&gt;   &lt;data: Description&gt;This is a test sales category &lt;/data: Description&gt;   &lt;data: Order&gt;1&lt;/data: Order&gt;   &lt;data: MarkForTranslation&gt;false &lt;/data: MarkForTranslation&gt;   . . . &lt;/data: SalesCategory&gt;</pre>   | <p>&lt;SalesCategory&gt; contains the details of the sales category, as follows:</p> <ul style="list-style-type: none"> <li>■ &lt;StageCategory&gt; is the name of the sales category.</li> <li>■ &lt;Description&gt; is a description of the sales category.</li> <li>■ &lt;Order&gt; is the order number of the sales category.</li> <li>■ &lt;MarkForTranslation&gt; corresponds to the Mark for Translation check box in the UI. For more information, see <a href="#">“Considerations for the Mark for Translation Setting”</a> on page 36.</li> </ul> |
| <pre>&lt;data: SalesCategory&gt;   . . .   &lt;data: ListOfSalesCategoryTranslations&gt;     &lt;data: SalesCategoryTranslation&gt;       &lt;data: LanguageCode&gt;ENU&lt;/data: LanguageCode&gt;       &lt;data: StageCategory&gt;My Test Sales Category 2     &lt;/data: SalesCategoryTranslation&gt;     &lt;data: Description&gt;&lt;/data: Description&gt;   &lt;/data: ListOfSalesCategoryTranslations&gt; &lt;/data: SalesCategory&gt;</pre> | <p>&lt;ListOfSalesCategoryTranslations&gt; specifies the translation values for the sales category:</p> <ul style="list-style-type: none"> <li>■ &lt;SalesCategoryTranslation&gt; contains details of the translation for one language.</li> <li>■ &lt;LanguageCode&gt; contains the three-letter language code for the language.</li> <li>■ &lt;StageCategory&gt; contains the translated sales category name.</li> <li>■ &lt;Description&gt; contains the translated description.</li> </ul>  |

## Migrating Sales Categories

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate sales categories:

- [“Extracting a Single Sales Category” on page 245](#)
- [“Extracting All Sales Categories” on page 245](#)
- [“Updating or Inserting Sales Categories \(Upsert\)” on page 246](#)

## Extracting a Single Sales Category

This topic describes how to extract a single sales category from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a sales category:

```
mi grati ontool -u UserID -s ServerURL Read SalesCategory Order
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *Order* is the order number of the sales category.

The output XML file is named with the order number of the sales category that is extracted. For example, if you extract the sales category that has the order number 2, then the XML file is named 2.xml.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Sales Category

The following is an example of extracting a sales category that has the order number 2:

```
mi grati ontool -u UserID -s ServerURL Read SalesCategory 2
```

## Extracting All Sales Categories

This topic describes how to extract all of the sales categories from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all of the sales categories:

```
mi grati ontool -u UserID -s ServerURL ReadAll SalesCategory
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

The output XML file is named with the order number of the first sales category in the file. For example, if the first sales category has the order number 1, then the XML file is named 1.xml.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting Sales Categories (Upsert)

This topic describes how to update a sales category (if it exists) or insert a sales category (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a sales category (if it exists) or insert a sales category (if it does not exist):

```
mi grati ontool -u UserID -s ServerURL Upsert SalesCategory SalesCategoryXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SalesCategoryXML* is the fully qualified path name of the sales categories XML file, for example:

```
C: \MyFiles\1.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
mi grati ontool -u UserID -s ServerURL Upsert SalesCategory "C: \My Files\1.xml "
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

# 28 Migrating Modification Tracking Settings

This chapter describes how to migrate your modification tracking settings using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Modification Tracking Settings on page 247](#)
- [Privileges Required for Migrating Modification Tracking Settings on page 248](#)
- [Elements and Sections in the Modification Tracking Settings XML Output File on page 248](#)
- [Migrating Modification Tracking Settings on page 248](#)

## Modification Tracking Settings

The modification tracking feature allows you to track run-time modifications to records of certain record types. You can use the Oracle Migration Tool On Demand client to migrate your modification tracking settings, and to enable or disable modification tracking for record types.

### Objects Supported for Modification Tracking

In addition to tracking run-time modifications to record types such as Account, Contact, and so on, the modification tracking feature can also track changes to the lists of values for picklist fields. For more information about modification tracking, see *Oracle CRM On Demand Online Help*, which also provides a list of the record types that support modification tracking.

[Table 78](#) describes the Oracle Migration Tool On Demand client commands used with modification tracking settings. These commands are case sensitive.

Table 78. Commands Used with Modification Tracking Settings in Oracle Migration Tool On Demand

| Command  | Description  |
|--|--|
| <code>ReadEnableModificationTracking<br/><i>SystemNameOfObject</i></code>              | This command extracts the modification tracking setting for a specific record type (object).<br><br><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">“System Names for Record Types” on page 411</a> .<br><br><b>NOTE:</b> The system name of the Picklist object is <code>Picklist</code> . |
| <code>ReadAllEnableModificationTracking</code>   | This command extracts the modification tracking settings for all objects.  |
| <code>UpsertEnableModificationTracking<br/><i>EnableModificationTrackingXML</i></code> | This command updates or inserts the modification tracking settings for one or more objects.  |

## Privileges Required for Migrating Modification Tracking Settings

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access and Manage Modification Tracking.
- For the Upsert command: Enable Web Services Access, Manage Modification Tracking, Manage Roles and Access, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Modification Tracking Settings XML Output File

Table 79 describes the elements and sections in the modification tracking settings XML output file.

Table 79. Elements and Sections in the Modification Tracking Settings XML File

| Element or Section  | Description   |
|---|---|
| <pre>&lt;data: ListOfEnableModificationTracking&gt;   &lt;data: EnableModificationTracking&gt;     &lt;data: Object&gt;Account&lt;/data: Object&gt;     &lt;data: Enabled&gt;true&lt;/data: Enabled&gt;   &lt;/data: EnableModificationTracking&gt; &lt;/data: ListOfEnableModificationTracking&gt;</pre> | <p>The &lt;EnableModificationTracking&gt; section contains the details of the modification tracking setting for one record type (object). It includes the following:</p> <ul style="list-style-type: none"> <li>■ &lt;Object&gt; contains the system name of the record type (object), which never changes.</li> <li>■ &lt;Enabled&gt; contains the setting for modification tracking for the object. Valid values are true (modification tracking is enabled for the object) and false (modification tracking is not enabled for the object).</li> </ul> |

## Migrating Modification Tracking Settings

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate modification tracking settings:

- [“Extracting Modification Tracking Settings for a Single Object” on page 249](#)
- [“Extracting Modification Tracking Settings for All Objects” on page 249](#)



- [“Updating Modification Tracking Settings \(Upsert\)” on page 250](#)

## Extracting Modification Tracking Settings for a Single Object

This topic describes how to extract the modification tracking settings for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
migration tool install/repository/AssignmentRule/EnableModificationTracking/RecordType.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the modification tracking settings for a single object:

```
migrationtool -u UserID -s ServerURL Read EnableModificationTracking SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) whose modification tracking settings you want to extract, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#).

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Modification Tracking Settings for a Single Object

The following is an example of extracting the modification tracking settings for a single object:

```
migrationtool -u UserID -s ServerURL Read EnableModificationTracking Account
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting Modification Tracking Settings for All Objects

This topic describes how to extract the modification tracking settings for all objects from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a single file in the following directory:

*migration tool install/repository/AssignmentRule/EnableModificationTracking/*

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the modification tracking settings for all objects:

```
migrationtool -u UserID -s ServerURL ReadAll EnableModificationTracking
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating Modification Tracking Settings (Upsert)

This topic describes how to update the modification tracking settings in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update the modification tracking settings:

```
migrationtool -u UserID -s ServerURL Upsert EnableModificationTracking  
EnableModificationTrackingXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *EnableModificationTrackingXML* is the fully qualified path name of the modification tracking settings XML file, for example:

```
C:\MyFiles\Account.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert EnableModificationTracking "C:\My  
Files\Account.xml "
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating Modification Tracking Settings

The following is an example of updating the modification tracking settings in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert EnableModificationTracking "C:\Oracle  
Migration Tool On Demand\repository\EnableModification\Account.xml "
```

**NOTE:** Quotation marks are required only if the fully qualified path name contains spaces.



# 29 Migrating Process Administration Configuration Data

---

This chapter describes how to migrate process administration configuration data using the Oracle Migration Tool On Demand client. It contains the following topics:

- [Process Administration on page 253](#)
- [Privileges Required for Migrating Process Administration Configuration Data on page 254](#)
- [Elements and Sections in the Process Administration XML Output File on page 255](#)
- [Migrating Process Administration Configuration Data on page 259](#)

## Process Administration

For certain record types, administrators can set up processes to prevent users, including external applications, from performing certain actions on records of that type when the records are in a particular state. Preventing users from performing certain actions in this way is referred to as *record locking*.

You can set up only one process for each of the record types that support process administration. For more information about process administration and the record types that support it, see *Oracle CRM On Demand Online Help*.

Table 80 describes the Oracle Migration Tool On Demand client commands used with process administration. These commands are case sensitive.

Table 80. Commands Used with Process Administration in Oracle Migration Tool On Demand

| Command  | Description   |
|--|---|
| Read ProcessAdmini strati on<br><i>SystemNameOfObj ect</i><br>[ <i>ProcessName</i> ] | <p>This command extracts the process administration configuration data for a specific record type. You must specify either a record type or a process name, or you can optionally specify both. The parameters are as follows:</p> <ul style="list-style-type: none"> <li>■ <i>SystemNameOfObject</i> is the system name of a record type. If you specify a process name in the command, then you do not need to specify a record type, but you must include an empty value for the <i>SystemNameOfObject</i> parameter. An empty value is specified as a set of double quotation marks (""). The system names for the record types are listed in “System Names for Record Types” on page 411.</li> <li>■ <i>ProcessName</i> is the name of a process. This parameter is optional if you specify a record type in the command.</li> </ul> |
| ReadAll ProcessAdmini strati on  | This command extracts the process administration configuration data for all record types.   |
| Upsert ProcessAdmini strati on<br><i>ProcessXML</i>                                  | This command updates or inserts the process administration configuration data for one record type.  |

## Privileges Required for Migrating Process Administration Configuration Data

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the Read and ReadAll commands: Enable Web Services Access, and Process Administration.
- For the Upsert commands: Enable Web Services Access, and Process Administration.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

# Elements and Sections in the Process Administration XML Output File

Table 81 describes the elements and sections in the process administration XML output file.

Table 81. Elements and Sections in the Process Administration XML File

| Element or Section   | Description   |
|--|---|
| <pre>&lt;data: Process&gt; . . . &lt;/data: Process&gt;</pre>  | The <Process> section contains all of the information for one process.  |
| <pre>&lt;data: Process&gt;   &lt;data: RecordType&gt;Acti vi ty   &lt;/data: RecordType&gt; . . . &lt;/data: Process&gt;</pre>                               | <RecordType> contains the system name of the record type (object), which never changes.   |
| <pre>&lt;data: Process&gt; . . .   &lt;data: ProcessName&gt;Acti vi ty Process   &lt;/data: ProcessName&gt; . . . &lt;/data: Process&gt;</pre>               | <ProcessName> contains the name given to the process.   |
| <pre>&lt;data: Process&gt; . . .   &lt;data: Pri maryFi el d&gt;Category   &lt;/data: Pri maryFi el d&gt; . . . &lt;/data: Process&gt;</pre>                 | <p>&lt;PrimaryField&gt; contains the name of the field in the record type that is to be used as a filter to restrict the process to certain records of the record type.</p> <p>Only the Activity record type supports the use of a primary field to restrict the process.</p> |
| <pre>&lt;data: Process&gt; . . .   &lt;data: Transi ti onFi el d&gt;Status   &lt;/data: Transi ti onFi el d&gt; . . . &lt;/data: Process&gt;</pre>           | <p>&lt;TransitionField&gt; contains the name of the field in the record type that determines the transition of records from one transition state to another.</p> <p>The Status field must be used as the transition field for all supported record types.</p>                 |
| <pre>&lt;data: Process&gt; . . .   &lt;data: Descri pti on&gt;Thi s i s a test   process.   &lt;/data: Descr i pti on&gt; . . . &lt;/data: Process&gt;</pre> | <Description> contains the description of the process.  |

Table 81. Elements and Sections in the Process Administration XML File

| Element or Section  | Description  |
|---|--|
| <pre>&lt;data: Process&gt; . . .   &lt;data: Order&gt;1   &lt;/data: Order&gt; . . . &lt;/data: Process&gt;</pre>   | <p>&lt;Order&gt; indicates the order of this process within the processes for the record type. The Order field is set to 1 by default, and you cannot update the field to a different value.</p> <p><b>NOTE:</b> If you specify an invalid value, such as a non-numeric string, for this element when you insert or update a process, then an error is returned.</p> |
| <pre>&lt;data: Process&gt; . . .   &lt;data: Default&gt;true   &lt;/data: Default&gt; . . . &lt;/data: Process&gt;</pre>  | <p>&lt;Default&gt; indicates if the process is the default process for the record type (true). The Default field is set to true by default, and you cannot update the field value to false.</p>  |
| <pre>&lt;data: Process&gt; . . .   &lt;data: ListOfPrimaryValues&gt;   &lt;data: PrimaryValues&gt;     &lt;data: Value&gt;Account Call     &lt;/data: Value&gt;   &lt;/PrimaryValues&gt;   &lt;data: PrimaryValues&gt;     &lt;data: Value&gt;Attendee Call     &lt;/data: Value&gt;   &lt;/data: PrimaryValues&gt; . . .   &lt;/data: ListOfPrimaryValues&gt; . . . &lt;/data: Process&gt;</pre> | <p>The &lt;ListOfPrimaryValues&gt; section contains the values in the primary field that are valid for the process. A record will be locked by the process only if the value in the primary field on the record is set to one of the values specified within the &lt;ListOfPrimaryValues&gt; section.</p>  |
| <pre>&lt;data: Process&gt; . . .   &lt;data: ListOfTransitionStates&gt; . . .   &lt;/data: ListOfTransitionStates&gt; . . . &lt;/data: Process&gt;</pre>  | <p>The &lt;ListOfTransitionStates&gt; section contains the details of the transition states for the process.</p>   |
| <pre>&lt;data: Process&gt; . . .   &lt;data: ListOfTransitionStates&gt;   &lt;data: TransitionStates&gt; . . .   &lt;/data: TransitionStates&gt; . . .   &lt;/data: ListOfTransitionStates&gt; . . . &lt;/data: Process&gt;</pre>   | <p>The &lt;TransitionStates&gt; section contains the details of one transition state for the process.</p>  |



Table 81. Elements and Sections in the Process Administration XML File

| Element or Section   | Description  |
|--|--|
| <pre> &lt;data: Process&gt;   . . .   &lt;data: ListOfTransitionStates&gt;     &lt;data: TransitionStates&gt;       &lt;data: State&gt;Deferred     &lt;/data: State&gt;     . . .   &lt;/data: TransitionStates&gt;   . . . &lt;/data: ListOfTransitionStates&gt; . . . &lt;/data: Process&gt; </pre>                     | <p>&lt;State&gt; contains the transition field value that identifies this transition state. Each transition field value can be used with only one transition state in the process.</p> <p>For upsert operations, the value in the &lt;State&gt; element must match an existing picklist value in the Status field for the record type.</p> |
| <pre> &lt;data: Process&gt;   . . .   &lt;data: ListOfTransitionStates&gt;     &lt;data: TransitionStates&gt;       . . .       &lt;data: Category&gt;Software     &lt;/data: Category&gt;     . . .   &lt;/data: TransitionStates&gt;   . . . &lt;/data: ListOfTransitionStates&gt; . . . &lt;/data: Process&gt; </pre>   | <p>&lt;Category&gt; contains the name of the sales category that the transition state is associated with.</p>  |
| <pre> &lt;data: Process&gt;   . . .   &lt;data: ListOfTransitionStates&gt;     &lt;data: TransitionStates&gt;       . . .       &lt;data: Description&gt;Test     &lt;/data: Description&gt;     . . .   &lt;/data: TransitionStates&gt;   . . . &lt;/data: ListOfTransitionStates&gt; . . . &lt;/data: Process&gt; </pre> | <p>&lt;Description&gt; contains a description of the transition state.</p>   |

Table 81. Elements and Sections in the Process Administration XML File

| Element or Section  | Description   |
|---|---|
| <pre> &lt;data: Process&gt;   . . .   &lt;data: Li stOfTransi ti onStates&gt;     &lt;data: Transi ti onStates&gt;       . . .       &lt;data: Created&gt;AB User 10/26/ 2012 10: 12: 40       &lt;/data: Created&gt;       . . .     &lt;/data: Transi ti onStates&gt;   . . . &lt;/data: Li stOfTransi ti onStates&gt; . . . &lt;/data: Process&gt; </pre>          | <p>&lt;Created&gt; contains the username of the user who created the transition state, and the date and time the transition state was created.</p>  |
| <pre> &lt;data: Process&gt;   . . .   &lt;data: Li stOfTransi ti onStates&gt;     &lt;data: Transi ti onStates&gt;       . . .       &lt;data: Modi fi ed&gt;AB User 11/23/ 2016 11: 27: 40       &lt;/data: Modi fi ed&gt;       . . .     &lt;/data: Transi ti onStates&gt;   . . . &lt;/data: Li stOfTransi ti onStates&gt; . . . &lt;/data: Process&gt; </pre>    | <p>&lt;Modified&gt; contains the username of the user who last updated the transition state, and the date and time the transition state was last updated.</p>   |
| <pre> &lt;data: Process&gt;   . . .   &lt;data: Li stOfTransi ti onStates&gt;     &lt;data: Transi ti onStates&gt;       . . .       &lt;data: Condi ti on&gt;         [{Pri ori ty}]="3-Low"       &lt;/data: Condi ti on&gt;       . . .     &lt;/data: Transi ti onStates&gt;   . . . &lt;/data: Li stOfTransi ti onStates&gt; . . . &lt;/data: Process&gt; </pre> | <p>&lt;Condition&gt; contains a condition that determines whether a record can move to this transition state.</p> <p><b>NOTE:</b> Do not use any calculated fields in the expression. Calculated fields are not supported in expressions in the Condition field on transition states.</p> |

Table 81. Elements and Sections in the Process Administration XML File

| Element or Section   | Description  |
|--|--|
| <pre> &lt;data: Process&gt;   . . .   &lt;data: Li stOfTransi ti onStates&gt;     &lt;data: Transi ti onStates&gt;       . . .       &lt;data: ErrorMessage&gt;         &lt;/data: ErrorMessage&gt;       . . .     &lt;/data: Transi ti onStates&gt;   . . . &lt;/data: Li stOfTransi ti onStates&gt; . . . &lt;/data: Process&gt; </pre>                   | <p>&lt;ErrorMessage&gt; contains the text for the error message that appears if the condition that is set up for the transition state is not met when a user tries to move a record of the record type specified in the process to this transition state.</p>  |
| <pre> &lt;data: Process&gt;   . . .   &lt;data: Li stOfTransi ti onStates&gt;     &lt;data: Transi ti onStates&gt;       . . .       &lt;data: Di sabl eUpdate&gt;         &lt;/data: Di sabl eUpdate&gt;       . . .     &lt;/data: Transi ti onStates&gt;   . . . &lt;/data: Li stOfTransi ti onStates&gt; . . . &lt;/data: Process&gt; </pre>             | <p>&lt;DisableUpdate&gt; determines whether a record can be updated when the record is in this state. If it is set to true, then users, including external applications, cannot update records of the record type specified in the process when the records are in this transition state.</p>          |
| <pre> &lt;data: Process&gt;   . . .   &lt;data: Li stOfTransi ti onStates&gt;     &lt;data: Transi ti onStates&gt;       . . .       &lt;data: Di sabl eDel eteOrRemove&gt;         &lt;/data: Di sabl eDel eteOrRemove&gt;       &lt;/data: Transi ti onStates&gt;     . . .   &lt;/data: Li stOfTransi ti onStates&gt; . . . &lt;/data: Process&gt; </pre> | <p>&lt;DisableDeleteOrRemove&gt; determines whether a record can be deleted when the record is in this state. If it is set to true, then users, including external applications, cannot delete records of the record type specified in the process while the records are in this transition state.</p> |

## Migrating Process Administration Configuration Data

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate process administration configuration data:

- ["Extracting a Process for a Single Object" on page 260](#)

- [“Extracting Processes for All Objects” on page 261](#)
- [“Updating or Inserting a Process \(Upsert\)” on page 261](#)

**NOTE:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting a Process for a Single Object

This topic describes how to extract a process for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follow:

```
migration tool install/repository/ProcessAdministration/RecordType.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the process for a single object:

```
migrationtool -u UserID -s ServerURL Read ProcessAdministration SystemNameOfObject [ProcessName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract the process, for example, Account. The system names for the record types are listed in [“System Names for Record Types” on page 411](#). If you specify a process name in the command, then you do not need to specify a record type, but you must include an empty value for the *SystemNameOfObject* parameter. An empty value is specified as a set of double quotation marks ("").
- *ProcessName* is the name of the process that you want to extract. This parameter is optional if you specify a record type in the command.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Process for a Single Object

The following is an example of extracting a process for a single object:

```
migrationtool -u UserID -s ServerURL Read ProcessAdministration Account "My Account Process"
```

**NOTE:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the process name contains spaces, then it must be enclosed with quotation marks.

## Extracting Processes for All Objects

This topic describes how to extract the processes for all objects from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the processes for all objects:

```
mi migrationtool -u UserID -s ServerURL ReadAll ProcessAdministration
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting a Process (Upsert)

This topic describes how to update a process (if it exists) or insert a process (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The Upsert command inserts or updates a process based on the following user key:

- <RecordType>

Oracle CRM On Demand attempts to locate the process specified in the input file based on the user key. If a process exists for the specified record type, then the process is updated. If a process does not exist for the specified record type, then a new process is created for that record type.

The Upsert command inserts or updates a process transition state based on the following user key:

- <State>

Oracle CRM On Demand attempts to locate a process transition state in the input file based on the user key. If a match is located, then the transition state is updated. If Oracle CRM On Demand cannot locate a transition state based on the user key, then a new transition state is created for the process for the record type.

**NOTE:** The `Read ProcessAdministration` and `ReadAll ProcessAdministration` commands do not extract the field setup and related access control configuration data for transition states, and the `Upsert ProcessAdministration` command does not insert or update this configuration data. So, if you extract a process that has field setup and related access control configuration data, and if you then insert the extracted process in a different environment, then no field setup and related access control configuration data is inserted for the process. However, if the process already exists in the target environment, and if you update the process, then any existing field setup and related access control configuration data on the process remains unchanged.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update a process for an object:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministration ProcessXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ProcessXML* is the fully qualified path name of the process administration XML file, for example:

```
C:\My Files\Account.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministration "C:\My Files\Account.xml"
```

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a Process

The following is an example of updating a process (if it exists) or inserting the process (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministration "C:\Oracle Migration Tool On Demand\repository\ProcessAdministration\Account.xml"
```

**NOTE:** Quotation marks are required only if the fully qualified path name contains spaces.

# 30 Replicating Configuration Data from a Source Environment to a Target Environment

This chapter describes how to migrate all or selective configuration data from a source environment to a target environment of Oracle CRM On Demand. It contains the following topics:

- [Replicating All Configuration Data from a Source Environment to a Target Environment on page 263](#)
- [Replicating Selective Configuration Data from a Source Environment to a Target Environment on page 270](#)

## Replicating All Configuration Data from a Source Environment to a Target Environment

This topic describes the Oracle Migration Tool On Demand client commands that you run to replicate all the configuration data from a source environment to a target environment of Oracle CRM On Demand.

**CAUTION:** Most components of Oracle CRM On Demand cannot revert to their original states by using the backup copies of the configuration data. For example, after a new access profile is inserted into the target environment, it cannot be removed by using the backup copy (that is, access profiles in Oracle CRM On Demand cannot be deleted). A backup copy of the configuration data provides a reference of the target environment before applying new configuration data.

**NOTE:** In the following examples, the Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### *To replicate all configuration data from a source environment to a target environment*

- 1 Open a command line window on the computer where you have installed the Oracle Migration Tool On Demand client, and navigate to the directory where you have installed it, for example:

```
C: \Oracle Migration Tool On Demand
```

- 2 Back up the existing configuration data in the target environment by running the following commands:

```
mi migrationtool -u UserID -s TargetServer ReadAll AccessProfile
```

```
mi migrationtool -u UserID -s TargetServer ReadAll ActionBarCustomWebApplet
```

```
mi migrationtool -u UserID -s TargetServer ReadAll ActionBarLayout
```

```
mi migrationtool -u UserID -s TargetServer ReadAll AssignmentRule
```

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating All Configuration Data from a Source Environment to a Target Environment

---

```
mi grati ontool -u UserID -s TargetServer ReadAl l Assi gnmentRul eGroup
mi grati ontool -u UserID -s TargetServer ReadAl l Cascadi ngPi ckl i st
mi grati ontool -u UserID -s TargetServer ReadAl l ConcatenatedFi el d
mi grati ontool -u UserID -s TargetServer ReadForVal ue CustomHTMLHeadTag
mi grati ontool -u UserID -s TargetServer ReadAl l CustomRecordType
mi grati ontool -u UserID -s TargetServer ReadAl l CustomWebLi nk
mi grati ontool -u UserID -s TargetServer ReadAl l CustomWebTab
mi grati ontool -u UserID -s TargetServer ReadAl l Detai l PageCustomWebAppl et
mi grati ontool -u UserID -s TargetServer ReadAl l Dynami cLayout
mi grati ontool -u UserID -s TargetServer ReadAl l Enabl eModi fi cati onTracki ng
mi grati ontool -u UserID -s TargetServer ReadAl l Fi el dAudi tSetUp
mi grati ontool -u UserID -s TargetServer ReadAl l Fi el dManagement
mi grati ontool -u UserID -s TargetServer ReadAl l HomePageCustomWebAppl et
mi grati ontool -u UserID -s TargetServer ReadAl l HomepageLayout
mi grati ontool -u UserID -s TargetServer ReadAl l HomeTabCustomWebAppl et
mi grati ontool -u UserID -s TargetServer ReadAl l Li stAccessAndOrder
mi grati ontool -u UserID -s TargetServer ReadAl l PageLayoutFi el d
mi grati ontool -u UserID -s TargetServer ReadAl l PageLayoutRel atedI nformati on
mi grati ontool -u UserID -s TargetServer ReadAl l PageLayoutSecti on
mi grati ontool -u UserID -s TargetServer ReadAl l Pi ckl i st
mi grati ontool -u UserID -s TargetServer ReadAl l Pi ckl i stVal ueGroup
mi grati ontool -u UserID -s TargetServer ReadAl l Rel atedI nformati onLayout
mi grati ontool -u UserID -s TargetServer ReadAl l ReportFol der
mi grati ontool -u UserID -s TargetServer ReadAl l Rol e
mi grati ontool -u UserID -s TargetServer ReadAl l Sal esAssessmentTempl ate
mi grati ontool -u UserID -s TargetServer ReadAl l Sal esCategory
mi grati ontool -u UserID -s TargetServer ReadAl l SearchLayout
mi grati ontool -u UserID -s TargetServer ReadAl l Workfl owRul eSet
mi grati ontool -u UserID -s TargetServer ReadAl l ProcessAdmi ni strati on
```

where:



## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating All Configuration Data from a Source Environment to a Target Environment

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- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand target environment where the extraction occurs.
- *TargetServer* is the URL for the Oracle CRM On Demand target server for the target environment.

In addition, back up all workflow action sets for each of the object names and trigger events that exist on the target server:

```
migratontool -u UserID -s TargetServer ReadForRuleSet WorkflowActionSet  
RecordType TriggerEvent [ParentRecordType]
```

For more details on extracting workflow action sets, see [“Extracting a Workflow Action or a Workflow Action Set” on page 193](#).

### 3 Retrieve all configuration data from the source environment by running the following commands:

```
migratontool -u UserID -s SourceServer ReadAll AccessProfile  
migratontool -u UserID -s SourceServer ReadAll ActionBarCustomWebApplet  
migratontool -u UserID -s SourceServer ReadAll ActionBarLayout  
migratontool -u UserID -s SourceServer ReadAll AssignmentRule  
migratontool -u UserID -s SourceServer ReadAll AssignmentRuleGroup  
migratontool -u UserID -s SourceServer ReadAll CascadingPicklist  
migratontool -u UserID -s SourceServer ReadAll ConcatenatedField  
migratontool -u UserID -s SourceServer ReadForValue CustomHTMLHeadTag  
migratontool -u UserID -s SourceServer ReadAll CustomRecordType  
migratontool -u UserID -s SourceServer ReadAll CustomWebLink  
migratontool -u UserID -s SourceServer ReadAll CustomWebTab  
migratontool -u UserID -s SourceServer ReadAll DetailPageCustomWebApplet  
migratontool -u UserID -s SourceServer ReadAll DynamicLayout  
migratontool -u UserID -s SourceServer ReadAll EnableModificationTracking  
migratontool -u UserID -s SourceServer ReadAll FieldAuditSetup  
migratontool -u UserID -s SourceServer ReadAll FieldManagement  
migratontool -u UserID -s SourceServer ReadAll HomePageCustomWebApplet  
migratontool -u UserID -s SourceServer ReadAll HomepageLayout  
migratontool -u UserID -s SourceServer ReadAll HomeTabCustomWebApplet  
migratontool -u UserID -s SourceServer ReadAll ListAccessAndOrder  
migratontool -u UserID -s SourceServer ReadAll PageLayoutField
```

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating All Configuration Data from a Source Environment to a Target Environment

---

```
mi grati ontool -u UserID -s SourceServer ReadAl l PageLayoutRel atedI nformati on
mi grati ontool -u UserID -s SourceServer ReadAl l PageLayoutSecti on
mi grati ontool -u UserID -s SourceServer ReadAl l Pi ckl i st
mi grati ontool -u UserID -s SourceServer ReadAl l Pi ckl i stVal ueGroup
mi grati ontool -u UserID -s SourceServer ReadAl l Rel atedI nformati onLayout
mi grati ontool -u UserID -s SourceServer ReadAl l ReportFol der
mi grati ontool -u UserID -s SourceServer ReadAl l Rol e
mi grati ontool -u UserID -s SourceServer ReadAl l Sal esAssessmentTempl ate
mi grati ontool -u UserID -s SourceServer ReadAl l Sal esCategory
mi grati ontool -u UserID -s SourceServer ReadAl l SearchLayout
mi grati ontool -u UserID -s SourceServer ReadAl l Workfl owRul eSet
mi grati ontool -u UserID -s SourceServer ReadAl l ProcessAdmi ni strati on
```

where:

- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand source environment where the extraction occurs.
- *SourceServer* is the URL for the Oracle CRM On Demand source server for the source environment.

In addition, extract all workflow action sets for each of the object names and trigger events that exist on the source server:

```
mi grati ontool -u UserID -s SourceServer ReadForRul eSet Workfl owActi onSet
RecordType TriggerEvent [ParentRecordType]
```

For more details on extracting workflow action sets, see ["Extracting a Workflow Action or a Workflow Action Set"](#).

- 4 Perform an Upsert operation (or an InsertOrUpdate operation, in the case of workflow rules and workflow actions) for each XML file to the target environment by running the following commands:

```
mi grati ontool -u UserID -s TargetServer Upsert CustomRecordType
CustomizedRecordTypeXML
mi grati ontool -u UserID -s TargetServer Upsert CustomWebTab CustomWebTabXML
mi grati ontool -u UserID -s TargetServer Upsert Fi el dManagement Fi el dManagementXML
mi grati ontool -u UserID -s TargetServer Upsert Pi ckl i st Pi ckl i stXML
mi grati ontool -u UserID -s TargetServer Upsert Cascadi ngPi ckl i st
Cascadi ngPi ckl i stXML
```

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating All Configuration Data from a Source Environment to a Target Environment

---

```
migratontool -u UserID -s TargetServer Upsert PicklistValueGroup  
PicklistValueGroupXML
```

```
migratontool -u UserID -s TargetServer Upsert CustomWebLink CustomWebLinkXML
```

```
migratontool -u UserID -s TargetServer Upsert ConcatenatedField  
ConcatenatedFieldXML
```

```
migratontool -u UserID -s TargetServer Upsert ActionBarCustomWebApplet  
ActionBarCustomWebAppletXML
```

```
migratontool -u UserID -s TargetServer Upsert DetailPageCustomWebApplet  
DetailPageCustomWebAppletXML
```

```
migratontool -u UserID -s TargetServer Upsert HomepageCustomWebApplet  
HomepageCustomWebAppletXML
```

```
migratontool -u UserID -s TargetServer Upsert HomeTabCustomWebApplet  
HomeTabCustomWebAppletXML
```

```
migratontool -u UserID -s TargetServer Upsert SalesAssessmentTemplate  
SalesAssessmentScriptXML
```

```
migratontool -u UserID -s TargetServer Upsert HomepageLayout HomepageLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert ActionBarLayout ActionBarLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert RelatedInformationLayout  
RelatedInfoLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert AccessProfile AccessProfileXML
```

```
migratontool -u UserID -s TargetServer Upsert PageLayoutField PageLayoutFieldXML
```

```
migratontool -u UserID -s TargetServer Upsert PageLayoutRelatedInformation  
PageLayoutRelatedXML
```

```
migratontool -u UserID -s TargetServer Upsert PageLayoutSection  
PageLayoutSectionXML
```

```
migratontool -u UserID -s TargetServer Upsert DynamicLayout DynamicLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert SearchLayout SearchLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert Role RoleXML
```

```
migratontool -u UserID -s TargetServer InsertOrUpdate WorkflowRules  
WorkflowRulesXML
```

```
migratontool -u UserID -s TargetServer InsertOrUpdate WorkflowActionSet  
WorkflowActionSetXML
```

```
migratontool -u UserID -s TargetServer Upsert AssignmentRuleGroup  
AssignmentRuleGroupXML
```

```
migratontool -u UserID -s TargetServer Upsert AssignmentRule AssignmentRuleXML
```

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating All Configuration Data from a Source Environment to a Target Environment

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```
migratontool -u UserID -s TargetServer Upsert ListAccessAndOrder  
ListAccessAndOrderXML
```

```
migratontool -u UserID -s TargetServer Upsert ReportFolder ReportFolderXML
```

```
migratontool -u UserID -s TargetServer Upsert CustomHTMLHeadTag  
CustomHTMLHeadTagXML
```

```
migratontool -u UserID -s TargetServer Upsert FieldAuditSetup  
FieldAuditSetupXML
```

```
migratontool -u UserID -s TargetServer Upsert SalesCategory SalesCategoryXML
```

```
migratontool -u UserID -s TargetServer Upsert EnableModificationTracking  
EnableModificationTrackingXML
```

```
migratontool -u UserID -s TargetServer Upsert ProcessAdministration ProcessXML
```

where:

- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand environment where the Upsert operation occurs.
- *TargetServer* is the URL for the Oracle CRM On Demand target server for the target environment.
- *AccessProfileXML* is the fully qualified path name of the access profile XML file, for example, C:\Oracle Migration Tool On Demand\repository\AccessProfile\MyCustomProfile.xml
- *ActionBarCustomWebAppletXML* is the fully qualified path name of the Action bar customized Web applet XML file, for example, C:\My Files\MyActionBarCustomWebApplet.xml
- *ActionBarLayoutXML* is the fully qualified path name of the Action Bar layout XML file, for example, C:\My Files\MyActionBarLayout.xml
- *AssignmentRuleGroupXML* is the fully qualified path name of the assignment rule group XML file, for example, C:\Oracle Migration Tool On Demand\repository\AssignmentRuleGroup\Account\My AssignmentRuleGroup.xml
- *AssignmentRuleXML* is the fully qualified path name of the assignment rule XML file, for example, C:\Oracle Migration Tool On Demand\repository\AssignmentRule\Account\My AssignmentRuleGroup\My AssignmentRule1.xml
- *CascadingPicklistXML* is the fully qualified path name of the cascading picklist XML file, for example, C:\My Files\MyCascadingPicklist.xml
- *ConcatenatedFieldXML* is the fully qualified path name of the concatenated field XML file, for example, C:\My Files\MyConcatenatedField.xml
- *CustomHTMLHeadTagXML* is the fully qualified path name of the custom HTML head tag additions XML file, for example, C:\My Files\CustomHTMLHeadTag.xml
- *CustomizedRecordTypeXML* is the fully qualified path name of the customized record type XML file, for example, C:\Oracle Migration Tool On Demand\repository\CustomRecordType\My CustomRecordType.xml
- *CustomWebLinkXML* is the fully qualified path name of the custom Web link XML file, for example, C:\My Files\MyCustomWebLink.xml

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating All Configuration Data from a Source Environment to a Target Environment

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- *CustomWebTabXML* is the fully qualified path name of the custom Web tab XML file, for example, C:\Oracle Migration Tool On Demand\repository\CustomWebTab\MyCustomWebTab.xml
- *DetailPageCustomWebAppletXML* is the fully qualified path name of the Detail page customized Web applet XML file, for example, C:\MyFiles\MyDetailPageCustomWebApplet.xml
- *DynamicLayoutXML* is the fully qualified path name of the dynamic layout XML file, for example, C:\Oracle Migration Tool On Demand\repository\DynamicLayout\MyDynamicLayout.xml
- *EnableModificationTrackingXML* is the fully qualified path name of the modification tracking settings XML file, for example C:\Oracle Migration Tool On Demand\repository\EnableModificationTracking\Account.xml
- *FieldAuditSetUpXML* is the fully qualified path name of the field audit setup XML file, for example C:\MyFiles\Account.xml
- *FieldManagementXML* is the fully qualified path name of the field management XML file, for example, C:\Oracle Migration Tool On Demand\repository\FieldManagement\MyFieldManagement.xml
- *HomepageCustomWebAppletXML* is the fully qualified path name of the Homepage customized Web applet XML file, for example, C:\MyFiles\MyHomePageCustomWebApplet.xml
- *HomepageLayoutXML* is the fully qualified path name of the homepage layout XML file, for example, C:\MyFiles\MyHomepageLayout.xml
- *HomeTabCustomWebAppletXML* is the fully qualified path name of the Home tab customized Web applet XML file, for example, C:\MyFiles\MyHomeTabCustomWebApplet.xml
- *ListAccessAndOrderXML* is the fully qualified path name of the list access and order layout XML file, for example C:\Oracle Migration Tool On Demand\repository>ListAccessAndOrder\Account\ExpertRole.xml
- *PageLayoutFieldXML* is the fully qualified path name of the page layout field information XML file for a specific object such as Account, for example, C:\MyFiles\PageLayoutFieldInformation\Account.xml
- *PageLayoutRelatedXML* is the fully qualified path name of the page layout related information XML file for a specific object such as Account, for example, C:\MyFiles\PageLayoutRelatedInformation\Account.xml
- *PageLayoutSectionXML* is the fully qualified path name of the page layout section XML file for a specific object such as Account, for example, C:\MyFiles\PageLayoutSection\Account.xml
- *PicklistXML* is the fully qualified path name of the picklist XML file, for example, C:\Oracle Migration Tool On Demand\repository\Picklist\MyPicklist.xml
- *PicklistValueGroupXML* is the fully qualified path name of the picklist value group XML file, for example, C:\MyFiles\MyPicklistValueGroup.xml
- *ProcessXML* is the fully qualified path name of the process administration XML file, for example, C:\MyFiles\Account.xml

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating Selective Configuration Data from a Source Environment to a Target

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- *RelatedInfoLayoutXML* is the fully qualified path name of the related information layout XML file, for example, C:\My Files\MyRelatedInfoLayout.xml
- *ReportFolderXML* is the fully qualified path name of the XML file for the role associations for a report folder, for example, C:\Oracle Migration Tool On Demand\repository\ReportFolder\MyFolder.xml
- *RoleXML* is the fully qualified path name of the role XML file, for example, C:\My Files\MyRole.xml
- *SalesAssessmentScriptXML* is the fully qualified path name of the sales assessment template XML file, for example, C:\My Files\MyAssessmentScript.xml
- *SalesCategoryXML* is the fully qualified path name of the sales category XML file, for example C:\My Files\1.xml
- *SearchLayoutXML* is the fully qualified path name of the search layout XML file, for example C:\Oracle Migration Tool On Demand\repository\SearchLayout\MyAccountSearchLayout.xml
- *WorkflowRulesXML* is the fully qualified path name of the workflow rules XML file, for example, C:\My Files\MyWorkflowRules.xml
- *WorkflowActionSetXML* is the fully qualified path name of the workflow action set XML file, for example, C:\My Files\MyWorkflowActionSet.xml

**NOTE:** The Upsert command must be run for each XML file that is retrieved from the source environment. For example, if ten access profile XML files are retrieved from the source environment, then ten Upsert operations (one for each XML file) are required.

## Replicating Selective Configuration Data from a Source Environment to a Target Environment

This topic describes the Oracle Migration Tool On Demand client commands that you run to replicate a subset of the configuration data from a source environment to a target environment of Oracle CRM On Demand.

**CAUTION:** Most components of Oracle CRM On Demand cannot revert to their original states by using the backup copies of the configuration data. For example, after a new access profile is inserted into the target environment, it cannot be removed by using the backup copy (that is, access profiles in Oracle CRM On Demand cannot be deleted). A backup copy of the configuration data provides a reference of the target environment before applying new configuration data.

**NOTE:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### *To replicate selective configuration data from a source environment to a target environment*

- 1 Open a command line window on the computer where you have installed Oracle Migration Tool On Demand client, and navigate to the directory where you have installed it, (for example, C: \Oracle Migration Tool On Demand).
- 2 Back up the configuration data that you want to change or update on the target environment by running the following command:

```
mi migrationtool -u UserID -s TargetServer ReadAll Type
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *TargetServer* is the URL for the Oracle CRM On Demand target server for the target environment.
- *Type* is the type of configuration data to be extracted from the target environment. It can be one of the following values:
  - ❑ **AccessProfile.** For Oracle CRM On Demand access profile configuration data.
  - ❑ **ActionBarCustomWebApplet.** For Oracle CRM On Demand Action bar Web applet configuration data.
  - ❑ **ActionBarLayout.** For Oracle CRM On Demand Action bar layout configuration data.
  - ❑ **AssignmentRuleGroup.** For Oracle CRM On Demand assignment rule groups.
  - ❑ **AssignmentRules.** For Oracle CRM On Demand assignment rules.
  - ❑ **CascadingPicklist.** For Oracle CRM On Demand cascading picklist configuration data.
  - ❑ **ConcatenatedField.** For Oracle CRM On Demand concatenated field configuration data.
  - ❑ **CustomRecordType.** For Oracle CRM On Demand record type configuration data.
  - ❑ **CustomWebLink.** For Oracle CRM On Demand customized Web link field configuration data.
  - ❑ **CustomWebTab.** For Oracle CRM On Demand Web tab configuration data.
  - ❑ **DetailPageCustomWebApplet.** For Oracle CRM On Demand Detail page Web applet configuration data.
  - ❑ **DynamicLayout.** For Oracle CRM On Demand dynamic layout configuration data.
  - ❑ **EnableModificationTracking.** For Oracle CRM On Demand modification tracking settings.
  - ❑ **FieldAuditSetup.** For Oracle CRM On Demand field audit setup configuration data.
  - ❑ **FieldManagement.** For Oracle CRM On Demand field configuration data.
  - ❑ **HomePageCustomWebApplet.** For Oracle CRM On Demand Homepage Web applet configuration data.
  - ❑ **HomepageLayout.** For Oracle CRM On Demand homepage layout configuration data.



## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating Selective Configuration Data from a Source Environment to a Target

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- ❑ **HomeTabCustomWebApplet.** For Oracle CRM On Demand Home tab Web applet configuration data.
- ❑ **ListAccessAndOrder.** For Oracle CRM On Demand list access and order layouts.
- ❑ **PageLayoutField.** For Oracle CRM On Demand page layout field configuration data.
- ❑ **PageLayoutRelatedInformation.** For Oracle CRM On Demand page layout related information configuration data.
- ❑ **PageLayoutSection.** For Oracle CRM On Demand page layout section configuration data.
- ❑ **Picklist.** For Oracle CRM On Demand customized picklist configuration data.
- ❑ **PicklistValueGroup.** For Oracle CRM On Demand picklist value group configuration data.
- ❑ **ProcessAdministration.** For Oracle CRM On Demand process administration configuration data.
- ❑ **RelatedInformationLayout.** For Oracle CRM On Demand related information configuration data.
- ❑ **ReportFolder.** For Oracle CRM On Demand role associations for report folders.
- ❑ **Role.** For Oracle CRM On Demand role configuration data.
- ❑ **SalesAssessmentTemplate.** For Oracle CRM On Demand sales assessment template configuration data.
- ❑ **SalesCategory.** For Oracle CRM On Demand field sales category configuration data.
- ❑ **SearchLayout.** For Oracle CRM On Demand search layout configuration data.
- ❑ **WorkflowActionSet.** For Oracle CRM On Demand workflow actions configuration data.
- ❑ **WorkflowRuleSet.** For Oracle CRM On Demand workflow rules configuration data.

**NOTE:** You can use any third-party application of your choice to store a history of changes, for example, IBM® Rational® ClearCase®.

- 3 If you want to back up the custom HTML head tag additions from the target server, run the following command:

```
mi grati ontool -u UserID -s TargetServer ReadForVal ue CustomHTMLHeadTag
```

- 4 Retrieve the required configuration data from the source environment by running one of the following commands:

- ❑ `mi grati ontool -u UserID -s SourceServer ReadAl l Type`
- ❑ `mi grati ontool -u UserID -s SourceServer Read Type MetadataFil ename`

where:

- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand source environment where the extraction occurs.
- *SourceServer* is the URL for the Oracle CRM On Demand source server for the source environment.



- *Type* is the type of configuration data to be extracted from the target environment. It can be one of the following values:
  - ❑ **AccessProfile**. For Oracle CRM On Demand access profile configuration data.
  - ❑ **ActionBarCustomWebApplet**. For Oracle CRM On Demand Action bar Web applet configuration data.
  - ❑ **ActionBarLayout**. For Oracle CRM On Demand Action bar layout configuration data.
  - ❑ **AssignmentRuleGroup**. For Oracle CRM On Demand assignment rule groups.
  - ❑ **AssignmentRules**. For Oracle CRM On Demand assignment rules.
  - ❑ **CascadingPicklist**. For Oracle CRM On Demand cascading picklist configuration data.
  - ❑ **ConcatenatedField**. For Oracle CRM On Demand concatenated field configuration data.
  - ❑ **CustomRecordType**. For Oracle CRM On Demand record type configuration data.
  - ❑ **CustomWebLink**. For Oracle CRM On Demand customized Web link field configuration data.
  - ❑ **CustomWebTab**. For Oracle CRM On Demand Web tab configuration data.
  - ❑ **DetailPageCustomWebApplet**. For Oracle CRM On Demand Detail page Web applet configuration data.
  - ❑ **DynamicLayout**. For Oracle CRM On Demand dynamic layout configuration data.
  - ❑ **EnableModificationTracking**. For Oracle CRM On Demand modification tracking settings.
  - ❑ **FieldAuditSetup**. For Oracle CRM On Demand field audit setup configuration data.
  - ❑ **FieldManagement**. For Oracle CRM On Demand field configuration data.
  - ❑ **HomePageCustomWebApplet**. For Oracle CRM On Demand Homepage Web applet configuration data.
  - ❑ **HomepageLayout**. For Oracle CRM On Demand homepage layout configuration data.
  - ❑ **HomeTabCustomWebApplet**. For Oracle CRM On Demand Home tab Web applet configuration data.
  - ❑ **ListAccessAndOrder**. For Oracle CRM On Demand list access and order layouts.
  - ❑ **PageLayoutField**. For Oracle CRM On Demand page layout field configuration data.
  - ❑ **PageLayoutRelatedInformation**. For Oracle CRM On Demand page layout related information configuration data.
  - ❑ **PageLayoutSection**. For Oracle CRM On Demand page layout section configuration data.
  - ❑ **Picklist**. For Oracle CRM On Demand customized picklist configuration data.
  - ❑ **PicklistValueGroup**. For Oracle CRM On Demand picklist value group configuration data.
  - ❑ **ProcessAdministration**. For Oracle CRM On Demand process administration configuration data.

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating Selective Configuration Data from a Source Environment to a Target

- ❑ **RelatedInformationLayout.** For Oracle CRM On Demand related information configuration data.
  - ❑ **ReportFolder.** For Oracle CRM On Demand role associations for report folders.
  - ❑ **Role.** For Oracle CRM On Demand role configuration data.
  - ❑ **SalesAssessmentTemplate.** For Oracle CRM On Demand sales assessment template configuration data.
  - ❑ **SalesCategory.** For Oracle CRM On Demand field sales category configuration data.
  - ❑ **SearchLayout.** For Oracle CRM On Demand search layout configuration data.
  - ❑ **WorkflowActionSet.** For Oracle CRM On Demand workflow actions configuration data.
  - ❑ **WorkflowRuleSet.** For Oracle CRM On Demand workflow rules configuration data.
- *MetadataFilename* is the name of the configuration data XML file to be retrieved, for example, for an access profile, use:

```
C:\Oracle Migration Tool On Demand\resources\template\AccessProfile.xml
```

**NOTE:** Running the `ReadAll` command is a simpler way to obtain the configuration data that you require if you are planning to replicate a subset of configuration data from the source environment. For example, if you are replicating ten access profiles out of twenty, then you can run one `ReadAll` command. However, performing a `Read` command is a way of retrieving the exact configuration data that you require.

- 5 If you want to extract the custom HTML head tag additions from the source server, run the following command:

```
migratontool -u UserID -s SourceServer ReadForValue CustomHTMLHeadTag
```

- 6 Perform an Upsert operation (or an InsertOrUpdate operation, in the case of workflow rules and workflow actions) for the required XML file to the target environment by running the following commands, as applicable:

```
migratontool -u UserID -s TargetServer Upsert CustomRecordType  
CustomizedRecordTypeXML
```

```
migratontool -u UserID -s TargetServer Upsert CustomWebTab CustomWebTabXML
```

```
migratontool -u UserID -s TargetServer Upsert FieldManagement FieldManagementXML
```

```
migratontool -u UserID -s TargetServer Upsert Picklist PicklistXML
```

```
migratontool -u UserID -s TargetServer Upsert CascadingPicklist  
CascadingPicklistXML
```

```
migratontool -u UserID -s TargetServer Upsert PicklistValueGroup  
PicklistValueGroupXML
```

```
migratontool -u UserID -s TargetServer Upsert CustomWebLink CustomWebLinkXML
```

```
migratontool -u UserID -s TargetServer Upsert ConcatenatedField  
ConcatenatedFieldXML
```

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating Selective Configuration Data from a Source Environment to a Target

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```
migratontool -u UserID -s TargetServer Upsert ActionBarCustomWebApplet  
ActionBarCustomWebAppletXML
```

```
migratontool -u UserID -s TargetServer Upsert DetailPageCustomWebApplet  
DetailPageCustomWebAppletXML
```

```
migratontool -u UserID -s TargetServer Upsert HomepageCustomWebApplet  
HomepageCustomWebAppletXML
```

```
migratontool -u UserID -s TargetServer Upsert HomeTabCustomWebApplet  
HomeTabCustomWebAppletXML
```

```
migratontool -u UserID -s TargetServer Upsert SalesAssessmentTemplate  
SalesAssessmentScriptXML
```

```
migratontool -u UserID -s TargetServer Upsert HomepageLayout HomepageLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert ActionBarLayout ActionBarLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert RelatedInformationLayout  
RelatedInfoLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert AccessProfile AccessProfileXML
```

```
migratontool -u UserID -s TargetServer Upsert PageLayoutField PageLayoutFieldXML
```

```
migratontool -u UserID -s TargetServer Upsert PageLayoutRelatedInformation  
PageLayoutRelatedXML
```

```
migratontool -u UserID -s TargetServer Upsert PageLayoutSection  
PageLayoutSectionXML
```

```
migratontool -u UserID -s TargetServer Upsert DynamicLayout DynamicLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert SearchLayout SearchLayoutXML
```

```
migratontool -u UserID -s TargetServer Upsert Role RoleXML
```

```
migratontool -u UserID -s TargetServer InsertOrUpdate WorkflowRules  
WorkflowRulesXML
```

```
migratontool -u UserID -s TargetServer InsertOrUpdate WorkflowActionSet  
WorkflowActionSetXML
```

```
migratontool -u UserID -s TargetServer Upsert AssignmentRuleGroup  
AssignmentRuleGroupXML
```

```
migratontool -u UserID -s TargetServer Upsert AssignmentRule AssignmentRuleXML
```

```
migratontool -u UserID -s TargetServer Upsert ListAccessAndOrder  
ListAccessAndOrderXML
```

```
migratontool -u UserID -s TargetServer Upsert ReportFolder ReportFolderXML
```

```
migratontool -u UserID -s TargetServer Upsert CustomHTMLHeadTag  
CustomHTMLHeadTagXML
```

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating Selective Configuration Data from a Source Environment to a Target

```
mi grati ontool -u UserID -s TargetServer Upsert FieldAuditSetup  
FieldAuditSetupXML
```

```
mi grati ontool -u UserID -s TargetServer Upsert SalesCategory SalesCategoryXML
```

```
mi grati ontool -u UserID -s TargetServer Upsert EnableModificationTracking  
EnableModificationTrackingXML
```

```
mi grati ontool -u UserID -s TargetServer Upsert ProcessAdministration ProcessXML
```

where:

- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand environment where the Upsert operation occurs.
- *TargetServer* is the URL for the Oracle CRM On Demand target server for the target environment.
- *AccessProfileXML* is the fully qualified path name of the access profile XML file, for example, C:\Oracle Migration Tool On Demand\repository\AccessProfile\MyCustomProfile.xml
- *ActionBarCustomWebAppletXML* is the fully qualified path name of the Action bar customized Web applet XML file, for example, C:\My Files\MyActionBarCustomWebApplet.xml
- *ActionBarLayoutXML* is the fully qualified path name of the Action Bar layout XML file, for example, C:\My Files\MyActionBarLayout.xml
- *AssignmentRuleGroupXML* is the fully qualified path name of the assignment rule group XML file, for example, C:\Oracle Migration Tool On Demand\repository\AssignmentRuleGroup\Account\My AssignmentRuleGroup.xml
- *AssignmentRuleXML* is the fully qualified path name of the assignment rule XML file, for example, C:\Oracle Migration Tool On Demand\repository\AssignmentRule\Account\My AssignmentRuleGroup\My AssignmentRule1.xml
- *CascadingPicklistXML* is the fully qualified path name of the cascading picklist XML file, for example, C:\My Files\MyCascadingPicklist.xml
- *CascadingPicklistXML* is the fully qualified path name of the cascading picklist XML file, for example, C:\My Files\MyCascadingPicklist.xml
- *ConcatenatedFieldXML* is the fully qualified path name of the concatenated field XML file, for example, C:\My Files\MyConcatenatedField.xml
- *CustomHTMLHeadTagXML* is the fully qualified path name of the custom HTML head tag additions XML file, for example, C:\My Files\CustomHTMLHeadTag.xml
- *CustomizedRecordTypeXML* is the fully qualified path name of the customized record type XML file, for example, C:\Oracle Migration Tool On Demand\repository\CustomRecordType\My CustomRecordType.xml
- *CustomWebLinkXML* is the fully qualified path name of the custom Web link XML file, for example, C:\My Files\MyCustomWebLink.xml
- *CustomWebTabXML* is the fully qualified path name of the custom Web tab XML file, for example, C:\Oracle Migration Tool On Demand\repository\CustomWebTab\My CustomWebTab.xml

- *DetailPageCustomWebAppletXML* is the fully qualified path name of the Detail page customized Web applet XML file, for example, C:\MyFiles\MyDetailPageCustomWebApplet.xml
- *DynamicLayoutXML* is the fully qualified path name of the dynamic layout XML file, for example, C:\Oracle Migration Tool On Demand\repository\DynamicLayout\MyDynamicLayout.xml
- *EnableModificationTrackingXML* is the fully qualified path name of the modification tracking settings XML file, for example C:\Oracle Migration Tool On Demand\repository\EnableModificationTracking\Account.xml
- *FieldAuditSetUpXML* is the fully qualified path name of the field audit setup XML file, for example C:\MyFiles\Account.xml
- *Field ManagementXML* is the fully qualified path name of the field management XML file, for example, C:\Oracle Migration Tool On Demand\repository\FieldManagement\MyFieldManagement.xml
- *HomepageCustomWebAppletXML* is the fully qualified path name of the Homepage customized Web applet XML file, for example, C:\MyFiles\MyHomePageCustomWebApplet.xml
- *HomepageLayoutXML* is the fully qualified path name of the homepage layout XML file, for example, C:\MyFiles\MyHomepageLayout.xml
- *HomeTabCustomWebAppletXML* is the fully qualified path name of the Home tab customized Web applet XML file, for example, C:\MyFiles\MyHomeTabCustomWebApplet.xml
- *ListAccessAndOrderXML* is the fully qualified path name of the list access and order layout XML file, for example C:\Oracle Migration Tool On Demand\repository>ListAccessAndOrder\Account\ExpertRole.xml
- *PageLayoutFieldXML* is the fully qualified path name of the page layout field information XML file for a specific object such as Account, for example, C:\MyFiles\PageLayoutFieldInformation\Account.xml
- *PageLayoutRelatedXML* is the fully qualified path name of the page layout related information XML file for a specific object such as Account, for example, C:\MyFiles\PageLayoutRelatedInformation\Account.xml
- *PageLayoutSectionXML* is the fully qualified path name of the page layout section XML file for a specific object such as Account, for example, C:\MyFiles\PageLayoutSection\Account.xml
- *PicklistXML* is the fully qualified path name of the picklist XML file, for example, C:\Oracle Migration Tool On Demand\repository\Picklist\MyPicklist.xml
- *PicklistValueGroupXML* is the fully qualified path name of the picklist value group XML file, for example, C:\MyFiles\MyPicklistValueGroup.xml
- *ProcessXML* is the fully qualified path name of the process administration XML file, for example, C:\MyFiles\Account.xml
- *RelatedInfoLayoutXML* is the fully qualified path name of the related information layout XML file, for example, C:\MyFiles\MyRelatedInfoLayout.xml

## Replicating Configuration Data from a Source Environment to a Target Environment

### ■ Replicating Selective Configuration Data from a Source Environment to a Target

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- *ReportFolderXML* is the fully qualified path name of the XML file of the role associations for a report folder, for example, C:\Oracle Migration Tool On Demand\repository\ReportFolder\MyFolder.xml
- *RoleXML* is the fully qualified path name of the role XML file, for example, C:\My Files\MyRole.xml
- *SalesAssessmentScriptXML* is the fully qualified path name of the sales assessment template XML file, for example, C:\My Files\MyAssessmentScript.xml
- *SalesCategoryXML* is the fully qualified path name of the sales category XML file, for example C:\My Files\1.xml
- *SearchLayoutXML* is the fully qualified path name of the search layout XML file, for example C:\Oracle Migration Tool On Demand\repository\SearchLayout\MyAccountSearchLayout.xml
- *WorkflowRulesXML* is the fully qualified path name of the workflow rules XML file, for example, C:\My Files\My WorkflowRules.xml
- *WorkflowActionSetXML* is the fully qualified path name of the workflow action set XML file, for example, C:\My Files\My WorkflowActionSet.xml

**NOTE:** The Upsert command must be run for each XML file that is retrieved from the source environment. For example, if ten access profile XML files are retrieved from the source, then ten Upsert operations (one for each XML file) are required.

# A Language Codes

This appendix contains the following topic:

- [Language Codes and Their Corresponding Language and Country on page 279](#)

## Language Codes and Their Corresponding Language and Country

Table 82 lists the three-letter language codes in Oracle CRM On Demand and their corresponding languages.

Table 82. Three-Letter Language Codes and Their Corresponding Language and Country

| Three-Letter Language Code | Language and country | Language Code | Language              | Country        |
|----------------------------|----------------------|---------------|-----------------------|----------------|
| DEU                        | de_DE                | de            | German                | Germany        |
| ENG                        | en_GB                | en            | English               | United Kingdom |
| ENU                        | en_US                | en            | English               | United States  |
| ESN                        | es_ES                | es            | Spanish               | Spain          |
| FRA                        | fr_FR                | fr            | French                | France         |
| ITA                        | it_IT                | it            | Italian               | Italy          |
| JPN                        | ja_JP                | ja            | Japanese              | Japan          |
| KOR                        | ko_KR                | ko            | Korean                | Korea          |
| PTG                        | pt_PT                | pt            | Portuguese            | Portugal       |
| THA                        | th_TH                | th            | Thai                  | Thailand       |
| CHS                        | zh_CN                | zh            | Chinese (Simplified)  | China          |
| CHT                        | zh_TW                | zh            | Chinese (Traditional) | Taiwan         |
| NLD                        | nl_NL                | nl            | Dutch                 | Netherlands    |
| DAN                        | da_DK                | da            | Danish                | Denmark        |
| FIN                        | fi_FI                | fi            | Finnish               | Finland        |
| PLK                        | pl_PL                | pl            | Polish                | Poland         |
| RUS                        | ru_RU                | ru            | Russian               | Russia         |

Table 82. Three-Letter Language Codes and Their Corresponding Language and Country

| Three-Letter Language Code | Language and country | Language Code | Language   | Country |
|----------------------------|----------------------|---------------|------------|---------|
| SVE                        | sv_SE                | sv            | Swedish    | Sweden  |
| PTB                        | pt_BR                | pt            | Portuguese | Brazil  |
| NOR                        | no_NO                | no            | Norwegian  | Norway  |
| TUR                        | tr_TR                | tr            | Turkish    | Turkey  |



# B Access Objects

This appendix contains the following topics:

- [Access Objects and Corresponding Display Names on page 281](#)
- [Access Levels and Corresponding Permission Codes in the XML File on page 384](#)

## Access Objects and Corresponding Display Names

An *access object* in the access profile XML file is a top-level record type or a related record type for which a permission can be granted in the access profile. This topic provides details of the access object names as they appear in the access profile XML files and their corresponding display names in the user interface for Oracle CRM On Demand. The display names shown in this topic are the display names that appear in the English-American (ENU) user interface in the standard application.

### How to Read the Table

In [Table 83 on page 282](#), the access object names that do not have a parent (indicated by *Not applicable* in the Access Object Name of Parent column in the table) are the top-level record types. In the following example, the table entry refers to the Account record type, which is a top-level record type. The access object name for this record type in the access profile XML file is Account:

| Access Object Name in the Access Profile XML File | Access Object Name of Parent | Display Name (ENU) | Object Type |
|---|------------------------------|--------------------|-------------|
| Account   | Not applicable               | Account            | Top         |

In [Table 83 on page 282](#), the access object names for which a top-level record type is shown in the Access Object Name of Parent column of the table are the related record types for the top-level record types. In the following example, the table entry refers to the Addresses record type, which is a related record type for the Account record type. The access object name for this record type in the access profile XML file is Acct Address:

| Access Object Name in the Access Profile XML File | Access Object Name of Parent | Display Name (ENU) | Object Type |
|---|------------------------------|--------------------|-------------|
| Acct Address                                      | Account                      | Addresses          | Child       |

In [Table 83 on page 282](#), if the access object is not a top-level record type, then the Object Type column indicates the type of relationship that the related record type has with the parent record type. The following abbreviations are used in the Object Type column in the table:

- 1-M (one-to-many)
- 1-M-Primary (one-to-many-primary)
- M-M (many-to-many)
- M-M-Primary (many-to-many-primary)

**NOTE:** Objects listed in [Table 83](#) with parentheses appear with a space after the opening parenthesis, and before the closing parenthesis in the XML file. For example, Account CustomObject4 (Account Id) appears as Account CustomObject4 ( Account Id ) in the XML file.

[Table 83](#) lists the access object names and their corresponding display names.

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                             | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| Account  | Not applicable               | Account            | Top         |
| Account AccountEvent ( Account Id )            | Account                      | Account Event      | Child       |
| Account Claim ( Business Account Id )          | Account                      | Claims             | 1-M         |
| Account CRMODLS_BPL_ACNT ( Account ID Id )     | Account                      | Plan Accounts      | 1-M-PRIMARY |
| Account CRMODLS_BusinessPlan ( Account ID Id ) | Account                      | Business Plans     | 1-M-PRIMARY |
| Account CRMODLS_OBJECTIVE ( Account Name Id )  | Account                      | Objectives         | 1-M-PRIMARY |
| Account CustomObject10 ( Account Id )          | Account                      | Custom Objects 10  | 1-M-PRIMARY |
| Account CustomObject11 ( Account Id )          | Account                      | Custom Objects 11  | 1-M-PRIMARY |
| Account CustomObject12 ( Account Id )          | Account                      | Custom Objects 12  | 1-M-PRIMARY |
| Account CustomObject13 ( Account Id )          | Account                      | Custom Objects 13  | 1-M-PRIMARY |
| Account CustomObject14 ( Account Id )          | Account                      | Custom Objects 14  | 1-M-PRIMARY |
| Account CustomObject15 ( Account Id )          | Account                      | Custom Objects 15  | 1-M-PRIMARY |
| Account CustomObject4 ( Account Id )           | Account                      | Custom Objects 04  | 1-M-PRIMARY |
| Account CustomObject5 ( Account Id )           | Account                      | Custom Objects 05  | 1-M-PRIMARY |
| Account CustomObject6 ( Account Id )           | Account                      | Custom Objects 06  | 1-M-PRIMARY |
| Account CustomObject7 ( Account Id )           | Account                      | Custom Objects 07  | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)                       | Object Type |
|---|------------------------------|--|-------------|
| Account CustomObject8 ( Account Id )                          | Account                      | Custom Objects 08                        | 1-M-PRIMARY |
| Account CustomObject9 ( Account Id )                          | Account                      | Custom Objects 09                        | 1-M-PRIMARY |
| Account DealRegistration ( Customer Id )                      | Account                      | Deal Registrations                       | 1-M         |
| Account FinancialAccount ( Branch Id )                        | Account                      | Financial Account: Branch                | 1-M-PRIMARY |
| Account FinancialAccount ( Business Account Id )              | Account                      | Financial Accounts                       | 1-M-PRIMARY |
| Account FinancialAccount ( Held Away Institution Id )         | Account                      | Financial Account: Held Away Institution | 1-M-PRIMARY |
| Account FinancialAccountHolder ( Business Account Id )        | Account                      | Financial Account Holders                | 1-M         |
| Account FinancialPlan ( Business Account Id )                 | Account                      | Financial Plans                          | 1-M         |
| Account Order ( Business Account Id )                         | Account                      | Orders                                   | 1-M         |
| Account Policy ( Business Account Id )                        | Account                      | Policies                                 | 1-M         |
| Account PolicyHolder ( Business Account Holder Id )           | Account                      | Policy Holders                           | 1-M         |
| Account Quote ( Business Account Id )                         | Account                      | Quotes                                   | 1-M         |
| Account SampleRequest ( Business Account Id )                 | Account                      | Sample Requests                          | 1-M         |
| Account SPRequest ( End Customer Id )                         | Account                      | Special Pricing Requests                 | 1-M         |
| Account/Audit Trail Item 2                                    | Account                      | Audit Trail                              | ReadOnly    |
| AccountEvent  | Not applicable               | Account Event                            | Top         |
| Accreditation   | Not applicable               | Accreditations                           | Top         |
| Accreditation AccreditationAttachment ( Accreditation Id )    | Accreditation                | Accreditation Attachments                | Child       |
| Accreditation AccreditationCertification ( Accreditation Id ) | Accreditation                | Accreditation Certifications             | Child       |
| Accreditation AccreditationProduct ( Accreditation Id )       | Accreditation                | Accreditation Products                   | Child       |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)                             | Object Type |
|---|------------------------------|--|-------------|
| Accreditation<br>AccreditationProductCategory<br>( Accreditation Id ) | Accreditation                | Accreditation<br>Product Product<br>Categories | Child       |
| Accreditation<br>AccreditationRelationship<br>( Accreditation Id )    | Accreditation                | Related<br>Accreditations                      | Child       |
| Accreditation AccreditationRequest<br>( Accreditation Id )            | Accreditation                | Accreditation<br>Requests                      | 1-M-PRIMARY |
| Accreditation AccreditationSolution<br>( Accreditation Id )           | Accreditation                | Accreditation<br>Solutions                     | Child       |
| Accreditation Custom Object 1<br>( Accreditation Id )                 | Accreditation                | Custom Objects 01                              | 1-M-PRIMARY |
| Accreditation Custom Object 2<br>( Accreditation Id )                 | Accreditation                | Custom Objects 02                              | 1-M-PRIMARY |
| Accreditation Custom Object 3<br>( Accreditation Id )                 | Accreditation                | Custom Objects 03                              | 1-M-PRIMARY |
| Accreditation CustomObject10<br>( Accreditation Id )                  | Accreditation                | Custom Objects 10                              | 1-M-PRIMARY |
| Accreditation CustomObject11<br>( Accreditation Id )                  | Accreditation                | Custom Objects 11                              | 1-M-PRIMARY |
| Accreditation CustomObject12<br>( Accreditation Id )                  | Accreditation                | Custom Objects 12                              | 1-M-PRIMARY |
| Accreditation CustomObject13<br>( Accreditation Id )                  | Accreditation                | Custom Objects 13                              | 1-M-PRIMARY |
| Accreditation CustomObject14<br>( Accreditation Id )                  | Accreditation                | Custom Objects 14                              | 1-M-PRIMARY |
| Accreditation CustomObject15<br>( Accreditation Id )                  | Accreditation                | Custom Objects 15                              | 1-M-PRIMARY |
| Accreditation CustomObject4<br>( Accreditation Id )                   | Accreditation                | Custom Objects 04                              | 1-M-PRIMARY |
| Accreditation CustomObject5<br>( Accreditation Id )                   | Accreditation                | Custom Objects 05                              | 1-M-PRIMARY |
| Accreditation CustomObject6<br>( Accreditation Id )                   | Accreditation                | Custom Objects 06                              | 1-M-PRIMARY |
| Accreditation CustomObject7<br>( Accreditation Id )                   | Accreditation                | Custom Objects 07                              | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                               | Access Object Name of Parent | Display Name (ENU)                       | Object Type |
|--|------------------------------|--|-------------|
| Accreditation CustomObject8 ( Accreditation Id ) | Accreditation                | Custom Objects 08                        | 1-M-PRIMARY |
| Accreditation CustomObject9 ( Accreditation Id ) | Accreditation                | Custom Objects 09                        | 1-M-PRIMARY |
| Accreditation/Accreditation Book                 | Accreditation                | Books                                    | Child       |
| Accreditation/AccreditationTeam                  | Accreditation                | Accreditation Teams                      | Child       |
| AccreditationAttachment                          | Not applicable               | Accreditation Attachments                | Top         |
| AccreditationCertification                       | Not applicable               | Accreditation Certifications             | Top         |
| AccreditationProduct                             | Not applicable               | Accreditation Products                   | Top         |
| AccreditationProductCategory                     | Not applicable               | Accreditation Product Product Categories | Top         |
| AccreditationRelationship                        | Not applicable               | Related Accreditations                   | Top         |
| AccreditationRequest                             | Not applicable               | Accreditation Requests                   | Top         |
| AccreditationSolution                            | Not applicable               | Accreditation Solutions                  | Top         |
| Acct Address                                     | Account                      | Addresses                                | Child       |
| Acct Asset                                       | Account                      | Assets                                   | 1-M         |
| Acct Att   | Account                      | Attachments                              | Child       |
| Acct Book  | Account                      | Books                                    | Child       |
| Acct Call  | Account                      | Calls                                    | 1-M-PRIMARY |
| Acct Cmpltd Activity                             | Account                      | Completed Activities                     | 1-M-PRIMARY |
| Acct Competitor                                  | Account                      | Account Competitors                      | Child       |
| Acct Contact                                     | Account                      | Contacts                                 | M-M         |
| Acct CustObj1                                    | Account                      | Custom Objects 01                        | M-M-PRIMARY |
| Acct CustObj2                                    | Account                      | Custom Objects 02                        | M-M-PRIMARY |
| Acct CustObj3                                    | Account                      | Custom Objects 03                        | M-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                             | Access Object Name of Parent | Display Name (ENU)    | Object Type |
|--|------------------------------|-----------------------|-------------|
| Acct Lead                                      | Account                      | Leads                 | 1-M-PRIMARY |
| Acct Note                                      | Account                      | Notes                 | Child       |
| Acct Open Activity                             | Account                      | Open Activities       | 1-M-PRIMARY |
| Acct Oppty                                     | Account                      | Opportunities         | 1-M-PRIMARY |
| Acct Partner                                   | Account                      | Account Partners      | Child       |
| Acct Portfolio                                 | Account                      | Portfolios            | 1-M         |
| Acct Rel                                       | Account                      | Account Relationships | Child       |
| Acct Revenue                                   | Account                      | Revenues              | Child       |
| Acct Sales Assmt                               | Account                      | Assessments           | 1-M         |
| Acct SR  | Account                      | Service Requests      | 1-M-PRIMARY |
| Acct Sub Acct                                  | Account                      | Sub-Accounts          | ReadOnly    |
| Acct Team                                      | Account                      | Account Team          | Child       |
| Acct Vehicle                                   | Account                      | Vehicles              | 1-M         |
| Action/Audit Trail Item 2                      | Activity                     | Audit Trail           | ReadOnly    |
| Activity                                       | Not applicable               | Activity              | Top         |
| Activity Att                                   | Activity                     | Attachments           | Child       |
| Activity Attendee Call                         | Activity                     | Attendee Call         | 1-M-PRIMARY |
| Activity Book                                  | Activity                     | Books                 | Child       |
| Activity Contact                               | Activity                     | Contacts              | M-M         |
| Activity CRMOD_LS_Transactions ( Activity Id ) | Activity                     | Sample Transactions   | 1-M         |
| Activity CRMODLS_PCD_MSGRSP ( Activity Id )    | Activity                     | Message Responses     | 1-M-PRIMARY |
| Activity CRMODLS_Signature ( Activity Id )     | Activity                     | Signature             | Child       |
| Activity CustObj1                              | Activity                     | Custom Objects 01     | M-M-PRIMARY |
| Activity CustObj2                              | Activity                     | Custom Objects 02     | M-M-PRIMARY |
| Activity CustObj3                              | Activity                     | Custom Objects 03     | M-M-PRIMARY |
| Activity CustomObject10 ( Activity Id )        | Activity                     | Custom Objects 10     | 1-M-PRIMARY |
| Activity CustomObject11 ( Activity Id )        | Activity                     | Custom Objects 11     | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                      | Access Object Name of Parent | Display Name (ENU)                 | Object Type |
|---|------------------------------|------------------------------------|-------------|
| Activity CustomObject12 ( Activity Id ) | Activity                     | Custom Objects 12                  | 1-M-PRIMARY |
| Activity CustomObject13 ( Activity Id ) | Activity                     | Custom Objects 13                  | 1-M-PRIMARY |
| Activity CustomObject14 ( Activity Id ) | Activity                     | Custom Objects 14                  | 1-M-PRIMARY |
| Activity CustomObject15 ( Activity Id ) | Activity                     | Custom Objects 15                  | 1-M-PRIMARY |
| Activity CustomObject4 ( Activity Id )  | Activity                     | Custom Objects 04                  | 1-M-PRIMARY |
| Activity CustomObject5 ( Activity Id )  | Activity                     | Custom Objects 05                  | 1-M-PRIMARY |
| Activity CustomObject6 ( Activity Id )  | Activity                     | Custom Objects 06                  | 1-M-PRIMARY |
| Activity CustomObject7 ( Activity Id )  | Activity                     | Custom Objects 07                  | 1-M-PRIMARY |
| Activity CustomObject8 ( Activity Id )  | Activity                     | Custom Objects 08                  | 1-M-PRIMARY |
| Activity CustomObject9 ( Activity Id )  | Activity                     | Custom Objects 09                  | 1-M-PRIMARY |
| Activity Fund Request ( Activity Id )   | Activity                     | Fund Requests                      | 1-M         |
| Activity MessagePlanVBC                 | Activity                     | Available Message Plans            | Child       |
| Activity Order ( Activity Id )          | Activity                     | Orders                             | 1-M         |
| Activity Prod Detail                    | Activity                     | Products Detailed                  | Child       |
| Activity Prod DetailVBC                 | Activity                     | Available Product Detailed         | Child       |
| Activity PromItem Drop                  | Activity                     | Promotional Item Dropped           | Child       |
| Activity Promo DropVBC                  | Activity                     | Available Promotional Item Dropped | Child       |
| Activity Sales Assmt                    | Activity                     | Activity Assessment                | 1-M         |
| Activity Samp Drop                      | Activity                     | Samples Dropped                    | Child       |
| Activity Samp DropVBC                   | Activity                     | Available Sample Dropped           | Child       |
| Activity SampleRequest ( Activity Id )  | Activity                     | Sample Requests                    | 1-M         |
| Activity Soln                           | Activity                     | Solutions                          | M-M         |
| Activity Team                           | Activity                     | Users                              | M-M         |
| Address                                 | Not applicable               | Address Locations                  | Top         |
| Application                             | Not applicable               | Application                        | Top         |
| Application Activity ( Application Id ) | Application                  | Activities                         | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                   | Access Object Name of Parent | Display Name (ENU)      | Object Type |
|--|------------------------------|-------------------------|-------------|
| Application ApplicationAttachment ( Application Id ) | Application                  | Application Attachments | Child       |
| Application Cmpltd Activity                          | Application                  | Completed Activities    | 1-M-PRIMARY |
| Application SmartCall ( Application Id )             | Application                  | Smart Calls             | 1-M         |
| Application/Application Book                         | Application                  | Books                   | Child       |
| Application/ApplicationTeam                          | Application                  | Application Teams       | Child       |
| Application/Audit Trail Item 2                       | Application                  | Audit Trail             | ReadOnly    |
| ApplicationAttachment                                | Not applicable               | Application Attachments | Top         |
| Asset  | Not applicable               | Asset                   | Top         |
| Auto Vehicle/Audit Trail Item 2                      | Vehicle                      | Audit Trail             | ReadOnly    |
| Auto Vehicle/Auto Vehicle Book                       | Vehicle                      | Books                   | Child       |
| BlockedProduct                                       | Not applicable               | Blocked Products        | Top         |
| Book   | Not applicable               | Books                   | Top         |
| Book Sub-Book  | Book                         | Sub-Books               | 1-M         |
| Book User  | Book                         | Users                   | Child       |
| BP Sales Assmt                                       | CRMODLS_Busin essPlan        | Assessments             | 1-M         |
| BrokerProfile  | Not applicable               | Broker Profiles         | Top         |
| BrokerProfile Custom Object 1 ( Broker Profile Id )  | BrokerProfile                | Custom Objects 01       | 1-M-PRIMARY |
| BrokerProfile Custom Object 2 ( Broker Profile Id )  | BrokerProfile                | Custom Objects 02       | 1-M-PRIMARY |
| BrokerProfile Custom Object 3 ( Broker Profile Id )  | BrokerProfile                | Custom Objects 03       | 1-M-PRIMARY |
| BrokerProfile CustomObject10 ( Broker Profile Id )   | BrokerProfile                | Custom Objects 10       | 1-M-PRIMARY |
| BrokerProfile CustomObject11 ( Broker Profile Id )   | BrokerProfile                | Custom Objects 11       | 1-M-PRIMARY |
| BrokerProfile CustomObject12 ( Broker Profile Id )   | BrokerProfile                | Custom Objects 12       | 1-M-PRIMARY |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)                                | Object Type |
|---|------------------------------|---|-------------|
| BrokerProfile CustomObject13 ( Broker Profile Id )                    | BrokerProfile                | Custom Objects 13                                 | 1-M-PRIMARY |
| BrokerProfile CustomObject14 ( Broker Profile Id )                    | BrokerProfile                | Custom Objects 14                                 | 1-M-PRIMARY |
| BrokerProfile CustomObject15 ( Broker Profile Id )                    | BrokerProfile                | Custom Objects 15                                 | 1-M-PRIMARY |
| BrokerProfile CustomObject4 ( Broker Profile Id )                     | BrokerProfile                | Custom Objects 04                                 | 1-M-PRIMARY |
| BrokerProfile CustomObject5 ( Broker Profile Id )                     | BrokerProfile                | Custom Objects 05                                 | 1-M-PRIMARY |
| BrokerProfile CustomObject6 ( Broker Profile Id )                     | BrokerProfile                | Custom Objects 06                                 | 1-M-PRIMARY |
| BrokerProfile CustomObject7 ( Broker Profile Id )                     | BrokerProfile                | Custom Objects 07                                 | 1-M-PRIMARY |
| BrokerProfile CustomObject8 ( Broker Profile Id )                     | BrokerProfile                | Custom Objects 08                                 | 1-M-PRIMARY |
| BrokerProfile CustomObject9 ( Broker Profile Id )                     | BrokerProfile                | Custom Objects 09                                 | 1-M-PRIMARY |
| Bulk Data Load  | Not applicable               | Bulk Data Load                                    | Top         |
| Call ProdDetail   | Not applicable               | Products Detailed                                 | Top         |
| Call ProdDetail<br>CallProdDetail_MsgPlanItem ( Product Detailed Id ) | Call ProdDetail              | Call Product Detail Messaging Plan Items          | 1-M-PRIMARY |
| Call ProdDetail<br>CallProdDetail_MsgPlnRel ( Product Detailed Id )   | Call ProdDetail              | Call Product Detail Messaging Plan Item Relations | 1-M-PRIMARY |
| Call ProdDetail CallProdDetail_MsgRsp ( Product Detailed Id )         | Call ProdDetail              | Call Product Detail Message Responses             | 1-M-PRIMARY |
| CallProdDetail_MsgPlanItem  | Not applicable               | Call Product Detail Messaging Plan Items          | Top         |
| CallProdDetail_MsgPlnRel  | Not applicable               | Call Product Detail Messaging Plan Item Relations | Top         |
| CallProdDetail_MsgRsp   | Not applicable               | Call Product Detail Message Responses             | Top         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                      | Access Object Name of Parent | Display Name (ENU)   | Object Type |
|---|------------------------------|----------------------|-------------|
| Camp Att                                | Campaign                     | Attachments          | Child       |
| Camp Cmpltd Activity                    | Campaign                     | Completed Activities | 1-M-PRIMARY |
| Camp Contact                            | Campaign                     | Contacts             | 1-M         |
| Camp CustObj1                           | Campaign                     | Custom Objects 01    | M-M-PRIMARY |
| Camp CustObj2                           | Campaign                     | Custom Objects 02    | M-M-PRIMARY |
| Camp CustObj3                           | Campaign                     | Custom Objects 03    | M-M-PRIMARY |
| Camp Lead                               | Campaign                     | Leads                | 1-M-PRIMARY |
| Camp Note                               | Campaign                     | Notes                | Child       |
| Camp Open Activity                      | Campaign                     | Open Activities      | 1-M-PRIMARY |
| Camp Oppty                              | Campaign                     | Opportunities        | M-M-PRIMARY |
| Campaign                                | Not applicable               | Campaign             | Top         |
| Campaign Application ( Campaign Id )    | Campaign                     | Applications         | 1-M         |
| Campaign CustomObject10 ( Campaign Id ) | Campaign                     | Custom Objects 10    | 1-M-PRIMARY |
| Campaign CustomObject11 ( Campaign Id ) | Campaign                     | Custom Objects 11    | 1-M-PRIMARY |
| Campaign CustomObject12 ( Campaign Id ) | Campaign                     | Custom Objects 12    | 1-M-PRIMARY |
| Campaign CustomObject13 ( Campaign Id ) | Campaign                     | Custom Objects 13    | 1-M-PRIMARY |
| Campaign CustomObject14 ( Campaign Id ) | Campaign                     | Custom Objects 14    | 1-M-PRIMARY |
| Campaign CustomObject15 ( Campaign Id ) | Campaign                     | Custom Objects 15    | 1-M-PRIMARY |
| Campaign CustomObject4 ( Campaign Id )  | Campaign                     | Custom Objects 04    | 1-M-PRIMARY |
| Campaign CustomObject5 ( Campaign Id )  | Campaign                     | Custom Objects 05    | 1-M-PRIMARY |
| Campaign CustomObject6 ( Campaign Id )  | Campaign                     | Custom Objects 06    | 1-M-PRIMARY |
| Campaign CustomObject7 ( Campaign Id )  | Campaign                     | Custom Objects 07    | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)                       | Object Type |
|---|------------------------------|--|-------------|
| Campaign CustomObject8 ( Campaign Id )                          | Campaign                     | Custom Objects 08                        | 1-M-PRIMARY |
| Campaign CustomObject9 ( Campaign Id )                          | Campaign                     | Custom Objects 09                        | 1-M-PRIMARY |
| Campaign FinancialAccount ( Campaign Id )                       | Campaign                     | Financial Accounts                       | 1-M-PRIMARY |
| Campaign FinancialPlan ( Campaign Id )                          | Campaign                     | Financial Plans                          | 1-M         |
| Campaign MDFRequest ( Campaign Id )                             | Campaign                     | MDF Requests                             | 1-M         |
| Campaign MedEdEvent ( Campaign Id )                             | Campaign                     | Events                                   | 1-M         |
| Campaign PartnerCampaign ( Campaign Id )                        | Campaign                     | Partner Campaigns                        | Child       |
| Campaign Policy ( Campaign Id )                                 | Campaign                     | Policies                                 | 1-M         |
| Campaign/Campaign Book  | Campaign                     | Books                                    | Child       |
| Certification   | Not applicable               | Certifications                           | Top         |
| Certification AccreditationCertification ( Certification Id )   | Certification                | Accreditation Certifications             | Child       |
| Certification CertificationAttachment ( Certification Id )      | Certification                | Certification Attachments                | Child       |
| Certification CertificationCourse ( Certification Id )          | Certification                | Certification Courses                    | Child       |
| Certification CertificationExam ( Certification Id )            | Certification                | Certification Exams                      | Child       |
| Certification CertificationProduct ( Certification Id )         | Certification                | Certification Products                   | Child       |
| Certification CertificationProductCategory ( Certification Id ) | Certification                | Certification Product Product Categories | Child       |
| Certification CertificationRelationship ( Certification Id )    | Certification                | Related Certifications                   | Child       |
| Certification CertificationRequest ( Certification Id )         | Certification                | Certification Requests                   | 1-M-PRIMARY |
| Certification CertificationSolution ( Certification Id )        | Certification                | Certification Solutions                  | Child       |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                    | Access Object Name of Parent | Display Name (ENU)        | Object Type |
|---|------------------------------|---------------------------|-------------|
| Certification Custom Object 1<br>( Certification Id ) | Certification                | Custom Objects 01         | 1-M-PRIMARY |
| Certification Custom Object 2<br>( Certification Id ) | Certification                | Custom Objects 02         | 1-M-PRIMARY |
| Certification Custom Object 3<br>( Certification Id ) | Certification                | Custom Objects 03         | 1-M-PRIMARY |
| Certification CustomObject10<br>( Certification Id )  | Certification                | Custom Objects 10         | 1-M-PRIMARY |
| Certification CustomObject11<br>( Certification Id )  | Certification                | Custom Objects 11         | 1-M-PRIMARY |
| Certification CustomObject12<br>( Certification Id )  | Certification                | Custom Objects 12         | 1-M-PRIMARY |
| Certification CustomObject13<br>( Certification Id )  | Certification                | Custom Objects 13         | 1-M-PRIMARY |
| Certification CustomObject14<br>( Certification Id )  | Certification                | Custom Objects 14         | 1-M-PRIMARY |
| Certification CustomObject15<br>( Certification Id )  | Certification                | Custom Objects 15         | 1-M-PRIMARY |
| Certification CustomObject4<br>( Certification Id )   | Certification                | Custom Objects 04         | 1-M-PRIMARY |
| Certification CustomObject5<br>( Certification Id )   | Certification                | Custom Objects 05         | 1-M-PRIMARY |
| Certification CustomObject6<br>( Certification Id )   | Certification                | Custom Objects 06         | 1-M-PRIMARY |
| Certification CustomObject7<br>( Certification Id )   | Certification                | Custom Objects 07         | 1-M-PRIMARY |
| Certification CustomObject8<br>( Certification Id )   | Certification                | Custom Objects 08         | 1-M-PRIMARY |
| Certification CustomObject9<br>( Certification Id )   | Certification                | Custom Objects 09         | 1-M-PRIMARY |
| Certification/Certification Book                      | Certification                | Books                     | Child       |
| Certification/CertificationTeam                       | Certification                | Certification Teams       | Child       |
| CertificationAttachment                               | Not applicable               | Certification Attachments | Top         |
| CertificationCourse                                   | Not applicable               | Certification Courses     | Top         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                           | Access Object Name of Parent | Display Name (ENU)                       | Object Type |
|--|------------------------------|--|-------------|
| CertificationExam                            | Not applicable               | Certification Exams                      | Top         |
| CertificationProduct                         | Not applicable               | Certification Products                   | Top         |
| CertificationProductCategory                 | Not applicable               | Certification Product Product Categories | Top         |
| CertificationRelationship                    | Not applicable               | Related Certifications                   | Top         |
| CertificationRequest                         | Not applicable               | Certification Requests                   | Top         |
| CertificationSolution                        | Not applicable               | Certification Solutions                  | Top         |
| Channel Partner CustomObject10 ( Dealer Id ) | Dealer                       | Custom Objects 10                        | 1-M-PRIMARY |
| Channel Partner CustomObject11 ( Dealer Id ) | Dealer                       | Custom Objects 11                        | 1-M-PRIMARY |
| Channel Partner CustomObject12 ( Dealer Id ) | Dealer                       | Custom Objects 12                        | 1-M-PRIMARY |
| Channel Partner CustomObject13 ( Dealer Id ) | Dealer                       | Custom Objects 13                        | 1-M-PRIMARY |
| Channel Partner CustomObject14 ( Dealer Id ) | Dealer                       | Custom Objects 14                        | 1-M-PRIMARY |
| Channel Partner CustomObject15 ( Dealer Id ) | Dealer                       | Custom Objects 15                        | 1-M-PRIMARY |
| Channel Partner CustomObject4 ( Dealer Id )  | Dealer                       | Custom Objects 04                        | 1-M-PRIMARY |
| Channel Partner CustomObject5 ( Dealer Id )  | Dealer                       | Custom Objects 05                        | 1-M-PRIMARY |
| Channel Partner CustomObject6 ( Dealer Id )  | Dealer                       | Custom Objects 06                        | 1-M-PRIMARY |
| Channel Partner CustomObject7 ( Dealer Id )  | Dealer                       | Custom Objects 07                        | 1-M-PRIMARY |
| Channel Partner CustomObject8 ( Dealer Id )  | Dealer                       | Custom Objects 08                        | 1-M-PRIMARY |
| Channel Partner CustomObject9 ( Dealer Id )  | Dealer                       | Custom Objects 09                        | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                              | Access Object Name of Parent | Display Name (ENU)     | Object Type |
|---|------------------------------|------------------------|-------------|
| Claim   | Not applicable               | Claims                 | Top         |
| Claim Activity ( Claim Id )                     | Claim                        | Activities             | 1-M-PRIMARY |
| Claim Cmpltd Activity                           | Claim                        | Completed Activities   | 1-M-PRIMARY |
| Claim Damage ( Claim Id )                       | Claim                        | Damages                | 1-M         |
| Claim InvolvedParty ( Claim Id )                | Claim                        | Involved Parties       | 1-M         |
| Claim Service Request ( Claim Id )              | Claim                        | Service Requests       | 1-M-PRIMARY |
| Claim SmartCall ( Claim Id )                    | Claim                        | Smart Calls            | 1-M         |
| Company   | Not applicable               | Companies              | Top         |
| Contact   | Not applicable               | Contact                | Top         |
| Contact Accreditation ( Contact Id )            | Contact                      | Accreditations         | 1-M         |
| Contact Acct                                    | Contact                      | Accounts               | M-M         |
| Contact Addr                                    | Contact                      | Addresses              | Child       |
| Contact Asset                                   | Contact                      | Assets                 | M-M         |
| Contact Att                                     | Contact                      | Attachments            | Child       |
| Contact BlockedProduct ( Contact Id )           | Contact                      | Blocked Products       | 1-M         |
| Contact Book                                    | Contact                      | Books                  | Child       |
| Contact Call                                    | Contact                      | Calls                  | M-M-PRIMARY |
| Contact Camp                                    | Contact                      | Campaigns              | 1-M         |
| Contact Certification ( Contact Id )            | Contact                      | Certifications         | 1-M         |
| Contact CertificationRequest ( Contact Id )     | Contact                      | Certification Requests | 1-M-PRIMARY |
| Contact Claim ( Contact Id )                    | Contact                      | Claims                 | 1-M         |
| Contact Cmpltd Activity                         | Contact                      | Completed Activities   | M-M-PRIMARY |
| Contact Course ( Contact Id )                   | Contact                      | Courses                | 1-M         |
| Contact CourseEnrollment ( Candidate Id )       | Contact                      | Course Enrollments     | 1-M-PRIMARY |
| Contact Coverage ( Contact Id )                 | Contact                      | Coverages              | 1-M         |
| Contact CRMOD_LS_ContactLicenses ( Contact Id ) | Contact                      | Contact State Licenses | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                 | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|--|------------------------------|---------------------|-------------|
| Contact CRMODLS_LS_Transactions ( Contact Id )     | Contact                      | Sample Transactions | 1-M         |
| Contact CRMODLS_BPL_CNTCT ( Contact Id )           | Contact                      | Plan Contacts       | 1-M-PRIMARY |
| Contact CRMODLS_OBJECTIVE ( Contact Name Id )      | Contact                      | Objectives          | 1-M-PRIMARY |
| Contact CRMODLS_Signature ( Contact Id )           | Contact                      | Signature           | Child       |
| Contact CustObj1                                   | Contact                      | Custom Objects 01   | M-M-PRIMARY |
| Contact CustObj2                                   | Contact                      | Custom Objects 02   | M-M-PRIMARY |
| Contact CustObj3                                   | Contact                      | Custom Objects 03   | M-M-PRIMARY |
| Contact CustomObject10 ( Contact Id )              | Contact                      | Custom Objects 10   | 1-M-PRIMARY |
| Contact CustomObject11 ( Contact Id )              | Contact                      | Custom Objects 11   | 1-M-PRIMARY |
| Contact CustomObject12 ( Contact Id )              | Contact                      | Custom Objects 12   | 1-M-PRIMARY |
| Contact CustomObject13 ( Contact Id )              | Contact                      | Custom Objects 13   | 1-M-PRIMARY |
| Contact CustomObject14 ( Contact Id )              | Contact                      | Custom Objects 14   | 1-M-PRIMARY |
| Contact CustomObject15 ( Contact Id )              | Contact                      | Custom Objects 15   | 1-M-PRIMARY |
| Contact CustomObject4 ( Contact Id )               | Contact                      | Custom Objects 04   | 1-M-PRIMARY |
| Contact CustomObject5 ( Contact Id )               | Contact                      | Custom Objects 05   | 1-M-PRIMARY |
| Contact CustomObject6 ( Contact Id )               | Contact                      | Custom Objects 06   | 1-M-PRIMARY |
| Contact CustomObject7 ( Contact Id )               | Contact                      | Custom Objects 07   | 1-M-PRIMARY |
| Contact CustomObject8 ( Contact Id )               | Contact                      | Custom Objects 08   | 1-M-PRIMARY |
| Contact CustomObject9 ( Contact Id )               | Contact                      | Custom Objects 09   | 1-M-PRIMARY |
| Contact DealRegistration ( Associated Contact Id ) | Contact                      | Deal Registrations  | 1-M         |
| Contact Exam ( Contact Id )                        | Contact                      | Exams               | 1-M         |
| Contact ExamRegistration ( Candidate Id )          | Contact                      | Exam Registrations  | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)                | Object Type |
|--|------------------------------|-----------------------------------|-------------|
| Contact FinancialAccount ( Account Holder Id )                 | Contact                      | Financial Account: Account Holder | 1-M-PRIMARY |
| Contact FinancialAccount ( Financial Advisor Id )              | Contact                      | Financial Accounts                | 1-M-PRIMARY |
| Contact FinancialAccountHolder ( Financial Account Holder Id ) | Contact                      | Financial Account Holders         | 1-M         |
| Contact FinancialPlan ( Contact Id )                           | Contact                      | Financial Plans                   | 1-M         |
| Contact HCPContactAllocation ( Contact Id )                    | Contact                      | HCP Contact Allocations           | 1-M         |
| Contact Household  | Contact                      | Households                        | M-M         |
| Contact Interest   | Contact                      | Contact Interests                 | Child       |
| Contact InvolvedParty ( Contact Id )                           | Contact                      | Involved Parties                  | 1-M         |
| Contact Lead   | Contact                      | Leads                             | 1-M-PRIMARY |
| Contact Med Ed   | Contact                      | Event                             | ReadOnly    |
| Contact Note   | Contact                      | Notes                             | Child       |
| Contact Open Activity  | Contact                      | Open Activities                   | M-M-PRIMARY |
| Contact Oppty  | Contact                      | Opportunities                     | M-M-PRIMARY |
| Contact Order ( Contact Id )                                   | Contact                      | Orders                            | 1-M         |
| Contact Policy ( Carrier Underwriter Id )                      | Contact                      | Policies                          | 1-M         |
| Contact Policy ( Primary Agent Id )                            | Contact                      | Policies                          | 1-M         |
| Contact PolicyHolder ( Contact Holder Id )                     | Contact                      | Policy Holders                    | 1-M         |
| Contact Portfolio  | Contact                      | Portfolios                        | Child       |
| Contact Referrals  | Contact                      | Referrals                         | 1-M         |
| Contact Rel  | Contact                      | Contact Relationships             | Child       |
| Contact Revenue  | Contact                      | Revenues                          | Child       |
| Contact Sales Assmt  | Contact                      | Contact Assessment                | 1-M         |
| Contact SampleRequest ( Contact Id )                           | Contact                      | Sample Requests                   | 1-M         |
| Contact SocialProfile ( Contact Id )                           | Contact                      | Social Profiles                   | 1-M         |
| Contact SR   | Contact                      | Service Requests                  | 1-M-PRIMARY |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                       | Access Object Name of Parent | Display Name (ENU)                | Object Type |
|--|------------------------------|-----------------------------------|-------------|
| Contact Team                             | Contact                      | Contact Team                      | Child       |
| Contact Vehicle                          | Contact                      | Vehicles                          | M-M         |
| Contact/Audit Trail Item 2               | Contact                      | Audit Trail                       | ReadOnly    |
| ContactBestTimes                         | Contact                      | Contact Best Times                | Child       |
| Course                                   | Not applicable               | Courses                           | Top         |
| Course CertificationCourse ( Course Id ) | Course                       | Certification Courses             | Child       |
| Course CourseAttachment ( Course Id )    | Course                       | Course Attachments                | Child       |
| Course CourseCategory ( Course Id )      | Course                       | Course Product Product Categories | Child       |
| Course CourseEnrollment ( Course Id )    | Course                       | Course Enrollments                | 1-M-PRIMARY |
| Course CourseExam ( Course Id )          | Course                       | Course Exams                      | Child       |
| Course CoursePartner ( Course Id )       | Course                       | Course Partners                   | Child       |
| Course CourseProduct ( Course Id )       | Course                       | Course Products                   | Child       |
| Course CourseRelationship ( Course Id )  | Course                       | Related Courses                   | Child       |
| Course CourseSolution ( Course Id )      | Course                       | Course Solutions                  | Child       |
| Course Custom Object 1 ( Course Id )     | Course                       | Custom Objects 01                 | 1-M-PRIMARY |
| Course Custom Object 2 ( Course Id )     | Course                       | Custom Objects 02                 | 1-M-PRIMARY |
| Course Custom Object 3 ( Course Id )     | Course                       | Custom Objects 03                 | 1-M-PRIMARY |
| Course CustomObject10 ( Course Id )      | Course                       | Custom Objects 10                 | 1-M-PRIMARY |
| Course CustomObject11 ( Course Id )      | Course                       | Custom Objects 11                 | 1-M-PRIMARY |
| Course CustomObject12 ( Course Id )      | Course                       | Custom Objects 12                 | 1-M-PRIMARY |
| Course CustomObject13 ( Course Id )      | Course                       | Custom Objects 13                 | 1-M-PRIMARY |
| Course CustomObject14 ( Course Id )      | Course                       | Custom Objects 14                 | 1-M-PRIMARY |
| Course CustomObject15 ( Course Id )      | Course                       | Custom Objects 15                 | 1-M-PRIMARY |
| Course CustomObject4 ( Course Id )       | Course                       | Custom Objects 04                 | 1-M-PRIMARY |
| Course CustomObject5 ( Course Id )       | Course                       | Custom Objects 05                 | 1-M-PRIMARY |
| Course CustomObject6 ( Course Id )       | Course                       | Custom Objects 06                 | 1-M-PRIMARY |
| Course CustomObject7 ( Course Id )       | Course                       | Custom Objects 07                 | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)                | Object Type |
|---|------------------------------|-----------------------------------|-------------|
| Course CustomObject8 ( Course Id )  | Course                       | Custom Objects 08                 | 1-M-PRIMARY |
| Course CustomObject9 ( Course Id )  | Course                       | Custom Objects 09                 | 1-M-PRIMARY |
| Course/Course Book  | Course                       | Books                             | Child       |
| Course/CourseTeam   | Course                       | Course Teams                      | Child       |
| CourseAttachment  | Not applicable               | Course Attachments                | Top         |
| CourseCategory  | Not applicable               | Course Product Product Categories | Top         |
| CourseEnrollment  | Not applicable               | Course Enrollments                | Top         |
| CourseExam  | Not applicable               | Course Exams                      | Top         |
| CoursePartner   | Not applicable               | Course Partners                   | Top         |
| CourseProduct   | Not applicable               | Course Products                   | Top         |
| CourseRelationship  | Not applicable               | Related Courses                   | Top         |
| CourseSolution  | Not applicable               | Course Solutions                  | Top         |
| Coverage  | Not applicable               | Coverages                         | Top         |
| CRMOD_LS_Allocation   | Not applicable               | Allocations                       | Top         |
| CRMOD_LS_Allocation/Audit Trail Item 2                                    | CRMOD_LS_Allocation          | Audit Trail                       | ReadOnly    |
| CRMOD_LS_Allocation/CRMOD_LS_Allocation Book                              | CRMOD_LS_Allocation          | Books                             | Child       |
| CRMOD_LS_ContactLicenses  | Not applicable               | Contact State Licenses            | Top         |
| CRMOD_LS_MessagingPlan  | Not applicable               | Messaging Plans                   | Top         |
| CRMOD_LS_MessagingPlan<br>CRMOD_LS_MsgPlanItem ( Parent Message Plan Id ) | CRMOD_LS_MessagingPlan       | Messaging Plan Items              | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan<br>CRMODLS_BusinessPlan ( Message Plan Id )        | CRMOD_LS_MessagingPlan       | Business Plans                    | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan<br>CRMODLS_PCD_MSGRSP ( Plan Id )                  | CRMOD_LS_MessagingPlan       | Message Responses                 | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan Custom Object 1 ( Plan Id )                        | CRMOD_LS_MessagingPlan       | Custom Objects 01                 | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)                       | Object Type |
|--|------------------------------|--|-------------|
| CRMOD_LS_MessagingPlan Custom Object 2 ( Plan Id )                               | CRMOD_LS_MessagingPlan       | Custom Objects 02                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan Custom Object 3 ( Plan Id )                               | CRMOD_LS_MessagingPlan       | Custom Objects 03                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject10 ( Plan Id )                                | CRMOD_LS_MessagingPlan       | Custom Objects 10                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject11 ( Plan Id )                                | CRMOD_LS_MessagingPlan       | Custom Objects 11                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject12 ( Plan Id )                                | CRMOD_LS_MessagingPlan       | Custom Objects 12                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject13 ( Plan Id )                                | CRMOD_LS_MessagingPlan       | Custom Objects 13                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject14 ( Plan Id )                                | CRMOD_LS_MessagingPlan       | Custom Objects 14                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject15 ( Plan Id )                                | CRMOD_LS_MessagingPlan       | Custom Objects 15                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject4 ( Plan Id )                                 | CRMOD_LS_MessagingPlan       | Custom Objects 04                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject5 ( Plan Id )                                 | CRMOD_LS_MessagingPlan       | Custom Objects 05                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject6 ( Plan Id )                                 | CRMOD_LS_MessagingPlan       | Custom Objects 06                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject7 ( Plan Id )                                 | CRMOD_LS_MessagingPlan       | Custom Objects 07                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject8 ( Plan Id )                                 | CRMOD_LS_MessagingPlan       | Custom Objects 08                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan CustomObject9 ( Plan Id )                                 | CRMOD_LS_MessagingPlan       | Custom Objects 09                        | 1-M-PRIMARY |
| CRMOD_LS_MessagingPlan/<br>CRMOD_LS_MessagingPlan Book                           | CRMOD_LS_MessagingPlan       | Books                                    | Child       |
| CRMOD_LS_MsgPlanItem   | Not applicable               | Messaging Plan Items                     | Top         |
| CRMOD_LS_MsgPlanItem<br>CallProdDetail_MsgPlanItem<br>( Messaging Plan Item Id ) | CRMOD_LS_MsgPlanItem         | Call Product Detail Messaging Plan Items | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)            | Object Type |
|--|------------------------------|-------------------------------|-------------|
| CRMOD_LS_MsgPlanItem<br>CRMOD_LS_MsgPlnRel ( Parent MP Item Id ) | CRMOD_LS_MsgPlanItem         | Messaging Plan Item Relations | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem<br>CRMODLS_PCD_MSGRSP ( Plan Item Id )      | CRMOD_LS_MsgPlanItem         | Message Responses             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem Custom Object 1 ( Plan Item Id )            | CRMOD_LS_MsgPlanItem         | Custom Objects 01             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem Custom Object 2 ( Plan Item Id )            | CRMOD_LS_MsgPlanItem         | Custom Objects 02             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem Custom Object 3 ( Plan Item Id )            | CRMOD_LS_MsgPlanItem         | Custom Objects 03             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject10 ( Plan Item Id )             | CRMOD_LS_MsgPlanItem         | Custom Objects 10             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject11 ( Plan Item Id )             | CRMOD_LS_MsgPlanItem         | Custom Objects 11             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject12 ( Plan Item Id )             | CRMOD_LS_MsgPlanItem         | Custom Objects 12             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject13 ( Plan Item Id )             | CRMOD_LS_MsgPlanItem         | Custom Objects 13             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject14 ( Plan Item Id )             | CRMOD_LS_MsgPlanItem         | Custom Objects 14             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject15 ( Plan Item Id )             | CRMOD_LS_MsgPlanItem         | Custom Objects 15             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject4 ( Plan Item Id )              | CRMOD_LS_MsgPlanItem         | Custom Objects 04             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject5 ( Plan Item Id )              | CRMOD_LS_MsgPlanItem         | Custom Objects 05             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject6 ( Plan Item Id )              | CRMOD_LS_MsgPlanItem         | Custom Objects 06             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject7 ( Plan Item Id )              | CRMOD_LS_MsgPlanItem         | Custom Objects 07             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject8 ( Plan Item Id )              | CRMOD_LS_MsgPlanItem         | Custom Objects 08             | 1-M-PRIMARY |
| CRMOD_LS_MsgPlanItem CustomObject9 ( Plan Item Id )              | CRMOD_LS_MsgPlanItem         | Custom Objects 09             | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)                                | Object Type |
|---|------------------------------|---|-------------|
| CRMOD_LS_MsgPlnRel  | Not applicable               | Messaging Plan Item Relations                     | Top         |
| CRMOD_LS_MsgPlnRel<br>CallProdDetail_MsgPlnRel ( Message Plan Item Rel Id ) | CRMOD_LS_MsgPlnRel           | Call Product Detail Messaging Plan Item Relations | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel Custom Object 1 ( Plan Item Relation Id )                | CRMOD_LS_MsgPlnRel           | Custom Objects 01                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel Custom Object 2 ( Plan Item Relation Id )                | CRMOD_LS_MsgPlnRel           | Custom Objects 02                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel Custom Object 3 ( Plan Item Relation Id )                | CRMOD_LS_MsgPlnRel           | Custom Objects 03                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject10 ( Plan Item Relation Id )              | CRMOD_LS_MsgPlnRel           | Custom Objects 10                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject11 ( Plan Item Relation Id )              | CRMOD_LS_MsgPlnRel           | Custom Objects 11                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject12 ( Plan Item Relation Id )              | CRMOD_LS_MsgPlnRel           | Custom Objects 12                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject13 ( Plan Item Relation Id )              | CRMOD_LS_MsgPlnRel           | Custom Objects 13                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject14 ( Plan Item Relation Id )              | CRMOD_LS_MsgPlnRel           | Custom Objects 14                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject15 ( Plan Item Relation Id )              | CRMOD_LS_MsgPlnRel           | Custom Objects 15                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject4 ( Plan Item Relation Id )               | CRMOD_LS_MsgPlnRel           | Custom Objects 04                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject5 ( Plan Item Relation Id )               | CRMOD_LS_MsgPlnRel           | Custom Objects 05                                 | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject6 ( Plan Item Relation Id )               | CRMOD_LS_MsgPlnRel           | Custom Objects 06                                 | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|---|------------------------------|---------------------|-------------|
| CRMOD_LS_MsgPlnRel<br>CustomObject7 ( Plan Item Relation Id )                   | CRMOD_LS_MsgPlnRel           | Custom Objects 07   | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject8 ( Plan Item Relation Id )                   | CRMOD_LS_MsgPlnRel           | Custom Objects 08   | 1-M-PRIMARY |
| CRMOD_LS_MsgPlnRel<br>CustomObject9 ( Plan Item Relation Id )                   | CRMOD_LS_MsgPlnRel           | Custom Objects 09   | 1-M-PRIMARY |
| CRMOD_LS_TransactionItems   | Not applicable               | Transaction Items   | Top         |
| CRMOD_LS_Transactions   | Not applicable               | Sample Transactions | Top         |
| CRMOD_LS_Transactions<br>CRMOD_LS_TransactionItems<br>( Sample Transaction Id ) | CRMOD_LS_Transactions        | Transaction Items   | 1-M-PRIMARY |
| CRMOD_LS_Transactions Custom Object 1 ( Transaction Id )                        | CRMOD_LS_Transactions        | Custom Objects 01   | 1-M-PRIMARY |
| CRMOD_LS_Transactions Custom Object 2 ( Transaction Id )                        | CRMOD_LS_Transactions        | Custom Objects 02   | 1-M-PRIMARY |
| CRMOD_LS_Transactions Custom Object 3 ( Transaction Id )                        | CRMOD_LS_Transactions        | Custom Objects 03   | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject10 ( Transaction Id )                      | CRMOD_LS_Transactions        | Custom Objects 10   | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject11 ( Transaction Id )                      | CRMOD_LS_Transactions        | Custom Objects 11   | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject12 ( Transaction Id )                      | CRMOD_LS_Transactions        | Custom Objects 12   | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject13 ( Transaction Id )                      | CRMOD_LS_Transactions        | Custom Objects 13   | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject14 ( Transaction Id )                      | CRMOD_LS_Transactions        | Custom Objects 14   | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject15 ( Transaction Id )                      | CRMOD_LS_Transactions        | Custom Objects 15   | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject4 ( Transaction Id )                       | CRMOD_LS_Transactions        | Custom Objects 04   | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject5 ( Transaction Id )                       | CRMOD_LS_Transactions        | Custom Objects 05   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)        | Object Type |
|--|------------------------------|---------------------------|-------------|
| CRMOD_LS_Transactions<br>CustomObject6 ( Transaction Id )                              | CRMOD_LS_Transactions        | Custom Objects 06         | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject7 ( Transaction Id )                              | CRMOD_LS_Transactions        | Custom Objects 07         | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject8 ( Transaction Id )                              | CRMOD_LS_Transactions        | Custom Objects 08         | 1-M-PRIMARY |
| CRMOD_LS_Transactions<br>CustomObject9 ( Transaction Id )                              | CRMOD_LS_Transactions        | Custom Objects 09         | 1-M-PRIMARY |
| CRMOD_LS_Transactions/<br>CRMOD_LS_Transactions Book                                   | CRMOD_LS_Transactions        | Books                     | Child       |
| CRMODLS_BPL_ACNT   | Not applicable               | Plan Accounts             | Top         |
| CRMODLS_BPL_CNTCT  | Not applicable               | Plan Contacts             | Top         |
| CRMODLS_BusinessPlan   | Not applicable               | Business Plan             | Top         |
| CRMODLS_BusinessPlan<br>AccreditationRequest ( Plan Id )                               | CRMODLS_BusinessPlan         | Accreditation Requests    | 1-M-PRIMARY |
| CRMODLS_BusinessPlan Activity<br>( Business Plan Id )                                  | CRMODLS_BusinessPlan         | Activities                | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CertificationRequest ( Plan Id )                               | CRMODLS_BusinessPlan         | Certification Requests    | 1-M-PRIMARY |
| CRMODLS_BusinessPlan Cmpltd<br>Activity  | CRMODLS_BusinessPlan         | Activities                | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CRMOD_LS_MessagingPlan ( Business Plan Id )                    | CRMODLS_BusinessPlan         | Messaging Plans           | 1-M         |
| CRMODLS_BusinessPlan<br>CRMODLS_BPL_ACNT ( Business Plan Id )                          | CRMODLS_BusinessPlan         | Plan Accounts             | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CRMODLS_BPL_CNTCT ( Business Plan Id )                         | CRMODLS_BusinessPlan         | Plan Contacts             | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CRMODLS_BusinessPlan ( Parent Plan Name Id )                   | CRMODLS_BusinessPlan         | Business Plans            | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CRMODLS_BusinessPlan_ATTACHMENT<br>( CRMODLS_BusinessPlan Id ) | CRMODLS_BusinessPlan         | Business Plan Attachments | Child       |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU) | Object Type |
|---|------------------------------|--------------------|-------------|
| CRMODLS_BusinessPlan<br>CRMODLS_OBJECTIVE ( Plan Name Id )    | CRMODLS_BusinessPlan         | Objectives         | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CRMODLS_PlanOpportunities ( Plan Id ) | CRMODLS_BusinessPlan         | Plan Opportunities | 1-M-PRIMARY |
| CRMODLS_BusinessPlan Custom<br>Object 1 ( Business Plan Id )  | CRMODLS_BusinessPlan         | Custom Objects 01  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan Custom<br>Object 2 ( Business Plan Id )  | CRMODLS_BusinessPlan         | Custom Objects 02  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan Custom<br>Object 3 ( Business Plan Id )  | CRMODLS_BusinessPlan         | Custom Objects 03  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject10 ( Business Plan Id )   | CRMODLS_BusinessPlan         | Custom Objects 10  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject11 ( Business Plan Id )   | CRMODLS_BusinessPlan         | Custom Objects 11  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject12 ( Business Plan Id )   | CRMODLS_BusinessPlan         | Custom Objects 12  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject13 ( Business Plan Id )   | CRMODLS_BusinessPlan         | Custom Objects 13  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject14 ( Business Plan Id )   | CRMODLS_BusinessPlan         | Custom Objects 14  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject15 ( Business Plan Id )   | CRMODLS_BusinessPlan         | Custom Objects 15  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject4 ( Business Plan Id )    | CRMODLS_BusinessPlan         | Custom Objects 04  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject5 ( Business Plan Id )    | CRMODLS_BusinessPlan         | Custom Objects 05  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject6 ( Business Plan Id )    | CRMODLS_BusinessPlan         | Custom Objects 06  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject7 ( Business Plan Id )    | CRMODLS_BusinessPlan         | Custom Objects 07  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject8 ( Business Plan Id )    | CRMODLS_BusinessPlan         | Custom Objects 08  | 1-M-PRIMARY |
| CRMODLS_BusinessPlan<br>CustomObject9 ( Business Plan Id )    | CRMODLS_BusinessPlan         | Custom Objects 09  | 1-M-PRIMARY |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)        | Object Type |
|---|------------------------------|---------------------------|-------------|
| CRMODLS_BusinessPlan MedEdEvent ( Business Plan Id )                            | CRMODLS_BusinessPlan         | Events                    | 1-M         |
| CRMODLS_BusinessPlan PartnerPlan ( Plan Id )                                    | CRMODLS_BusinessPlan         | Partner Plans             | Child       |
| CRMODLS_BusinessPlan SmartCall ( Business Plan Id )                             | CRMODLS_BusinessPlan         | Smart Calls               | 1-M         |
| CRMODLS_BusinessPlan/Audit Trail Item 2   | CRMODLS_BusinessPlan         | Audit Trail               | ReadOnly    |
| CRMODLS_BusinessPlan/CRMODLS_BusinessPlan Book                                  | CRMODLS_BusinessPlan         | Books                     | Child       |
| CRMODLS_BusinessPlan/CRMODLS_BusinessPlanTeam                                   | CRMODLS_BusinessPlan         | Business Plan Teams       | Child       |
| CRMODLS_BusinessPlan_ATTACHMENTS  | Not applicable               | Business Plan Attachments | Top         |
| CRMODLS_InventoryAuditReport  | Not applicable               | Inventory Audit Reports   | Top         |
| CRMODLS_InventoryAuditReport<br>CRMODLS_SampleInventory ( Audit Report Id )     | CRMODLS_InventoryAuditReport | Sample Inventory          | Child       |
| CRMODLS_InventoryAuditReport/CRMODLS_InventoryAuditReport Book                  | CRMODLS_InventoryAuditReport | Books                     | Child       |
| CRMODLS_InventoryPeriod   | Not applicable               | Inventory Periods         | Top         |
| CRMODLS_InventoryPeriod<br>CRMOD_LS_Transactions ( Inventory Period Id )        | CRMODLS_InventoryPeriod      | Sample Transactions       | 1-M         |
| CRMODLS_InventoryPeriod<br>CRMODLS_InventoryAuditReport ( Inventory Period Id ) | CRMODLS_InventoryPeriod      | Inventory Audit Reports   | 1-M         |
| CRMODLS_InventoryPeriod<br>CRMODLS_SampleInventory ( Inventory Period Id )      | CRMODLS_InventoryPeriod      | Sample Inventory          | Child       |
| CRMODLS_InventoryPeriod Custom Object 1 ( Invt Period Id )                      | CRMODLS_InventoryPeriod      | Custom Objects 01         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod Custom Object 2 ( Invt Period Id )                      | CRMODLS_InventoryPeriod      | Custom Objects 02         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod Custom Object 3 ( Invt Period Id )                      | CRMODLS_InventoryPeriod      | Custom Objects 03         | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)        | Object Type |
|--|------------------------------|---------------------------|-------------|
| CRMODLS_InventoryPeriod CustomObject10 ( Invt Period Id )  | CRMODLS_Invent<br>oryPeriod  | Custom Objects 10         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject11 ( Invt Period Id )  | CRMODLS_Invent<br>oryPeriod  | Custom Objects 11         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject12 ( Invt Period Id )  | CRMODLS_Invent<br>oryPeriod  | Custom Objects 12         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject13 ( Invt Period Id )  | CRMODLS_Invent<br>oryPeriod  | Custom Objects 13         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject14 ( Invt Period Id )  | CRMODLS_Invent<br>oryPeriod  | Custom Objects 14         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject15 ( Invt Period Id )  | CRMODLS_Invent<br>oryPeriod  | Custom Objects 15         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject4 ( Invt Period Id )   | CRMODLS_Invent<br>oryPeriod  | Custom Objects 04         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject5 ( Invt Period Id )   | CRMODLS_Invent<br>oryPeriod  | Custom Objects 05         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject6 ( Invt Period Id )   | CRMODLS_Invent<br>oryPeriod  | Custom Objects 06         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject7 ( Invt Period Id )   | CRMODLS_Invent<br>oryPeriod  | Custom Objects 07         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject8 ( Invt Period Id )   | CRMODLS_Invent<br>oryPeriod  | Custom Objects 08         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod CustomObject9 ( Invt Period Id )   | CRMODLS_Invent<br>oryPeriod  | Custom Objects 09         | 1-M-PRIMARY |
| CRMODLS_InventoryPeriod/<br>CRMODLS_InventoryPeriod Book   | CRMODLS_Invent<br>oryPeriod  | Books                     | Child       |
| CRMODLS_ModificationLog                                    | Not applicable               | Modification<br>Trackings | Top         |
| CRMODLS_OBJECTIVE  | Not applicable               | Objective                 | Top         |
| CRMODLS_OBJECTIVE Accreditation<br>( Objective Id )        | CRMODLS_OBJE<br>CTIVE        | Accreditations            | 1-M         |
| CRMODLS_OBJECTIVE<br>AccreditationRequest ( Objective Id ) | CRMODLS_OBJE<br>CTIVE        | Accreditation<br>Requests | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE Activity<br>( Objective Id )             | CRMODLS_OBJE<br>CTIVE        | Activities                | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)     | Object Type |
|---|------------------------------|------------------------|-------------|
| CRMODLS_OBJECTIVE Certification ( Objective Id )                        | CRMODLS_OBJECTIVE            | Certifications         | 1-M         |
| CRMODLS_OBJECTIVE CertificationRequest ( Objective Id )                 | CRMODLS_OBJECTIVE            | Certification Requests | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE Cmpltd Activity                                       | CRMODLS_OBJECTIVE            | Activities             | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE Course ( Objective Id )                               | CRMODLS_OBJECTIVE            | Courses                | 1-M         |
| CRMODLS_OBJECTIVE CourseEnrollment ( Objective Id )                     | CRMODLS_OBJECTIVE            | Course Enrollments     | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE CRMOD_LS_MessagingPlan ( PrimaryObj Id )              | CRMODLS_OBJECTIVE            | Messaging Plans        | 1-M         |
| CRMODLS_OBJECTIVE CRMODLS_OBJECTIVE ( Parent Objective Id )             | CRMODLS_OBJECTIVE            | Objectives             | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE CRMODLS_OBJECTIVE_ATTACHMENT ( CRMODLS_OBJECTIVE Id ) | CRMODLS_OBJECTIVE            | Objective Attachments  | Child       |
| CRMODLS_OBJECTIVE Custom Object 1 ( Objective Id )                      | CRMODLS_OBJECTIVE            | Custom Objects 01      | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE Custom Object 2 ( Objective Id )                      | CRMODLS_OBJECTIVE            | Custom Objects 02      | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE Custom Object 3 ( Objective Id )                      | CRMODLS_OBJECTIVE            | Custom Objects 03      | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE CustomObject10 ( Objective Id )                       | CRMODLS_OBJECTIVE            | Custom Objects 10      | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE CustomObject11 ( Objective Id )                       | CRMODLS_OBJECTIVE            | Custom Objects 11      | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE CustomObject12 ( Objective Id )                       | CRMODLS_OBJECTIVE            | Custom Objects 12      | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE CustomObject13 ( Objective Id )                       | CRMODLS_OBJECTIVE            | Custom Objects 13      | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE CustomObject14 ( Objective Id )                       | CRMODLS_OBJECTIVE            | Custom Objects 14      | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE CustomObject15 ( Objective Id )                       | CRMODLS_OBJECTIVE            | Custom Objects 15      | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                     | Access Object Name of Parent | Display Name (ENU)          | Object Type |
|--|------------------------------|-----------------------------|-------------|
| CRMODLS_OBJECTIVE<br>CustomObject4 ( Objective Id )    | CRMODLS_OBJECTIVE            | Custom Objects 04           | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE<br>CustomObject5 ( Objective Id )    | CRMODLS_OBJECTIVE            | Custom Objects 05           | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE<br>CustomObject6 ( Objective Id )    | CRMODLS_OBJECTIVE            | Custom Objects 06           | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE<br>CustomObject7 ( Objective Id )    | CRMODLS_OBJECTIVE            | Custom Objects 07           | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE<br>CustomObject8 ( Objective Id )    | CRMODLS_OBJECTIVE            | Custom Objects 08           | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE<br>CustomObject9 ( Objective Id )    | CRMODLS_OBJECTIVE            | Custom Objects 09           | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE<br>DealRegistration ( Objective Id ) | CRMODLS_OBJECTIVE            | Deal Registrations          | 1-M         |
| CRMODLS_OBJECTIVE Exam<br>( Objective Id )             | CRMODLS_OBJECTIVE            | Exams                       | 1-M         |
| CRMODLS_OBJECTIVE<br>ExamRegistration ( Objective Id ) | CRMODLS_OBJECTIVE            | Exam Registrations          | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE Fund<br>( Objective Id )             | CRMODLS_OBJECTIVE            | Funds                       | 1-M         |
| CRMODLS_OBJECTIVE Lead<br>( Objective Id )             | CRMODLS_OBJECTIVE            | Leads                       | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE MDFRequest<br>( Objective Id )       | CRMODLS_OBJECTIVE            | MDF Requests                | 1-M         |
| CRMODLS_OBJECTIVE MedEdEvent<br>( Objective Id )       | CRMODLS_OBJECTIVE            | Events                      | 1-M         |
| CRMODLS_OBJECTIVE Opportunity<br>( Objective Id )      | CRMODLS_OBJECTIVE            | Opportunities               | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE Service<br>Request ( Objective Id )  | CRMODLS_OBJECTIVE            | Service Requests            | 1-M-PRIMARY |
| CRMODLS_OBJECTIVE SmartCall<br>( Objective Id )        | CRMODLS_OBJECTIVE            | Smart Calls                 | 1-M         |
| CRMODLS_OBJECTIVE SPRequest<br>( Objective Id )        | CRMODLS_OBJECTIVE            | Special Pricing<br>Requests | 1-M         |
| CRMODLS_OBJECTIVE/Audit Trail<br>Item 2                | CRMODLS_OBJECTIVE            | Audit Trail                 | ReadOnly    |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)                       | Object Type |
|--|------------------------------|--|-------------|
| CRMODLS_OBJECTIVE/<br>CRMODLS_OBJECTIVE Book                             | CRMODLS_OBJE<br>CTIVE        | Books                                    | Child       |
| CRMODLS_OBJECTIVE/<br>CRMODLS_OBJECTIVETeam                              | CRMODLS_OBJE<br>CTIVE        | Objective Teams                          | Child       |
| CRMODLS_OBJECTIVE_ATTACHMENT   | Not applicable               | Objective Attachments                    | Top         |
| CRMODLS_PCD_MSGRSP   | Not applicable               | Message Responses                        | Top         |
| CRMODLS_PCD_MSGRSP<br>CallProdDetail_MsgRsp ( Messaging<br>Response Id ) | CRMODLS_PCD_<br>MSGRSP       | Call Product Detail<br>Message Responses | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP Custom<br>Object 1 ( Message Response Id )            | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 01                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP Custom<br>Object 2 ( Message Response Id )            | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 02                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP Custom<br>Object 3 ( Message Response Id )            | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 03                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject10 ( Message Response<br>Id )          | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 10                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject11 ( Message Response<br>Id )          | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 11                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject12 ( Message Response<br>Id )          | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 12                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject13 ( Message Response<br>Id )          | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 13                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject14 ( Message Response<br>Id )          | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 14                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject15 ( Message Response<br>Id )          | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 15                        | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject4 ( Message Response<br>Id )           | CRMODLS_PCD_<br>MSGRSP       | Custom Objects 04                        | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|---|------------------------------|---------------------|-------------|
| CRMODLS_PCD_MSGRSP<br>CustomObject5 ( Message Response Id )   | CRMODLS_PCD_MSGRSP           | Custom Objects 05   | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject6 ( Message Response Id )   | CRMODLS_PCD_MSGRSP           | Custom Objects 06   | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject7 ( Message Response Id )   | CRMODLS_PCD_MSGRSP           | Custom Objects 07   | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject8 ( Message Response Id )   | CRMODLS_PCD_MSGRSP           | Custom Objects 08   | 1-M-PRIMARY |
| CRMODLS_PCD_MSGRSP<br>CustomObject9 ( Message Response Id )   | CRMODLS_PCD_MSGRSP           | Custom Objects 09   | 1-M-PRIMARY |
| CRMODLS_PlanOpportunities                                     | Not applicable               | Plan Opportunities  | Top         |
| CRMODLS_RELDISC   | Not applicable               | Related Disclaimers | Top         |
| CRMODLS_RELDISC<br>CRMODLS_SIGNDISC ( Primary Disclaimer Id ) | CRMODLS_RELDISC              | Sample Disclaimers  | 1-M         |
| CRMODLS_SampleInventory                                       | Not applicable               | Sample Inventory    | Top         |
| CRMODLS_SampleLot   | Not applicable               | Sample Lots         | Top         |
| CRMODLS_SampleLot Custom Object 1 ( Sample Lot Id )           | CRMODLS_SampleLot            | Custom Objects 01   | 1-M-PRIMARY |
| CRMODLS_SampleLot Custom Object 2 ( Sample Lot Id )           | CRMODLS_SampleLot            | Custom Objects 02   | 1-M-PRIMARY |
| CRMODLS_SampleLot Custom Object 3 ( Sample Lot Id )           | CRMODLS_SampleLot            | Custom Objects 03   | 1-M-PRIMARY |
| CRMODLS_SampleLot<br>CustomObject10 ( Sample Lot Id )         | CRMODLS_SampleLot            | Custom Objects 10   | 1-M-PRIMARY |
| CRMODLS_SampleLot<br>CustomObject11 ( Sample Lot Id )         | CRMODLS_SampleLot            | Custom Objects 11   | 1-M-PRIMARY |
| CRMODLS_SampleLot<br>CustomObject12 ( Sample Lot Id )         | CRMODLS_SampleLot            | Custom Objects 12   | 1-M-PRIMARY |
| CRMODLS_SampleLot<br>CustomObject13 ( Sample Lot Id )         | CRMODLS_SampleLot            | Custom Objects 13   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                 | Access Object Name of Parent | Display Name (ENU)   | Object Type |
|--|------------------------------|----------------------|-------------|
| CRMODLS_SampleLot CustomObject14 ( Sample Lot Id ) | CRMODLS_SampleLot            | Custom Objects 14    | 1-M-PRIMARY |
| CRMODLS_SampleLot CustomObject15 ( Sample Lot Id ) | CRMODLS_SampleLot            | Custom Objects 15    | 1-M-PRIMARY |
| CRMODLS_SampleLot CustomObject4 ( Sample Lot Id )  | CRMODLS_SampleLot            | Custom Objects 04    | 1-M-PRIMARY |
| CRMODLS_SampleLot CustomObject5 ( Sample Lot Id )  | CRMODLS_SampleLot            | Custom Objects 05    | 1-M-PRIMARY |
| CRMODLS_SampleLot CustomObject6 ( Sample Lot Id )  | CRMODLS_SampleLot            | Custom Objects 06    | 1-M-PRIMARY |
| CRMODLS_SampleLot CustomObject7 ( Sample Lot Id )  | CRMODLS_SampleLot            | Custom Objects 07    | 1-M-PRIMARY |
| CRMODLS_SampleLot CustomObject8 ( Sample Lot Id )  | CRMODLS_SampleLot            | Custom Objects 08    | 1-M-PRIMARY |
| CRMODLS_SampleLot CustomObject9 ( Sample Lot Id )  | CRMODLS_SampleLot            | Custom Objects 09    | 1-M-PRIMARY |
| CRMODLS_SampleLot/<br>CRMODLS_SampleLot Book       | CRMODLS_SampleLot            | Books                | Child       |
| CRMODLS_Signature                                  | Not applicable               | Signature            | Top         |
| CRMODLS_Signature/Audit Trail Item 2               | CRMODLS_Signature            | Audit Trail          | ReadOnly    |
| CRMODLS_SIGNDISC                                   | Not applicable               | Sample Disclaimers   | Top         |
| CRMODLS_SIGNDISC<br>CRMODLS_RELDISC ( Parent Id )  | CRMODLS_SIGNDISC             | Related Disclaimers  | Child       |
| CustObj1   | Not applicable               | Custom Object 01     | Top         |
| CustObj1 Acct                                      | CustObj1                     | Accounts             | M-M         |
| CustObj1 Asset                                     | CustObj1                     | Assets               | M-M         |
| CustObj1 Att                                       | CustObj1                     | Attachments          | Child       |
| CustObj1 Book                                      | CustObj1                     | Books                | Child       |
| CustObj1 Camp                                      | CustObj1                     | Campaigns            | M-M         |
| CustObj1 Cmpltd Activity                           | CustObj1                     | Completed Activities | M-M-PRIMARY |
| CustObj1 Contact                                   | CustObj1                     | Contacts             | M-M         |
| CustObj1 CustObj1                                  | CustObj1                     | Custom Objects 01    | M-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name       | Access Object Name of Parent | Display Name (ENU)    | Object Type |
|--------------------------|------------------------------|-----------------------|-------------|
| CustObj1 CustObj2        | CustObj1                     | Custom Objects 02     | M-M-PRIMARY |
| CustObj1 CustObj3        | CustObj1                     | Custom Objects 03     | M-M-PRIMARY |
| CustObj1 Dealer          | CustObj1                     | Dealers               | M-M         |
| CustObj1 Fund            | CustObj1                     | Fund                  | M-M         |
| CustObj1 Fund Request    | CustObj1                     | Fund Requests         | M-M         |
| CustObj1 Household       | CustObj1                     | Households            | M-M         |
| CustObj1 Lead            | CustObj1                     | Leads                 | M-M-PRIMARY |
| CustObj1 MedEd           | CustObj1                     | Event                 | M-M         |
| CustObj1 Note            | CustObj1                     | Notes                 | Child       |
| CustObj1 Open Activity   | CustObj1                     | Open Activities       | M-M-PRIMARY |
| CustObj1 Opportunity     | CustObj1                     | Opportunities         | M-M-PRIMARY |
| CustObj1 Partner         | CustObj1                     | Partner               | M-M         |
| CustObj1 Portfolio       | CustObj1                     | Portfolios            | M-M         |
| CustObj1 Prod            | CustObj1                     | Products              | M-M         |
| CustObj1 Service Request | CustObj1                     | Service Requests      | M-M-PRIMARY |
| CustObj1 Solution        | CustObj1                     | Solutions             | M-M         |
| CustObj1 Team            | CustObj1                     | Custom Object 01 Team | Child       |
| CustObj1 Vehicle         | CustObj1                     | Vehicles              | M-M         |
| CustObj2                 | Not applicable               | Custom Object 02      | Top         |
| CustObj2 Acct            | CustObj2                     | Accounts              | M-M         |
| CustObj2 Asset           | CustObj2                     | Assets                | M-M         |
| CustObj2 Att             | CustObj2                     | Attachments           | Child       |
| CustObj2 Book            | CustObj2                     | Books                 | Child       |
| CustObj2 Camp            | CustObj2                     | Campaigns             | M-M         |
| CustObj2 Cmpltd Activity | CustObj2                     | Completed Activities  | M-M-PRIMARY |
| CustObj2 Contact         | CustObj2                     | Contacts              | M-M         |
| CustObj2 CustObj1        | CustObj2                     | Custom Objects 01     | M-M-PRIMARY |
| CustObj2 CustObj2        | CustObj2                     | Custom Objects 02     | M-M-PRIMARY |
| CustObj2 CustObj3        | CustObj2                     | Custom Objects 03     | M-M-PRIMARY |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name       | Access Object Name of Parent | Display Name (ENU)    | Object Type |
|--------------------------|------------------------------|-----------------------|-------------|
| CustObj2 Dealer          | CustObj2                     | Dealers               | M-M         |
| CustObj2 Fund            | CustObj2                     | Fund                  | M-M         |
| CustObj2 Fund Request    | CustObj2                     | Fund Requests         | M-M         |
| CustObj2 Household       | CustObj2                     | Households            | M-M         |
| CustObj2 Lead            | CustObj2                     | Leads                 | M-M-PRIMARY |
| CustObj2 MedEd           | CustObj2                     | Event                 | M-M         |
| CustObj2 Note            | CustObj2                     | Notes                 | Child       |
| CustObj2 Open Activity   | CustObj2                     | Open Activities       | M-M-PRIMARY |
| CustObj2 Opportunity     | CustObj2                     | Opportunities         | M-M-PRIMARY |
| CustObj2 Partner         | CustObj2                     | Partner               | M-M         |
| CustObj2 Portfolio       | CustObj2                     | Portfolios            | M-M         |
| CustObj2 Prod            | CustObj2                     | Products              | M-M         |
| CustObj2 Service Request | CustObj2                     | Service Requests      | M-M-PRIMARY |
| CustObj2 Solution        | CustObj2                     | Solutions             | M-M         |
| CustObj2 Team            | CustObj2                     | Custom Object 02 Team | Child       |
| CustObj2 Vehicle         | CustObj2                     | Vehicles              | M-M         |
| CustObj3                 | Not applicable               | Custom Object 03      | Top         |
| CustObj3 Acct            | CustObj3                     | Accounts              | M-M         |
| CustObj3 Asset           | CustObj3                     | Assets                | M-M         |
| CustObj3 Att             | CustObj3                     | Attachments           | Child       |
| CustObj3 Book            | CustObj3                     | Books                 | Child       |
| CustObj3 Camp            | CustObj3                     | Campaigns             | M-M         |
| CustObj3 Cmpltd Activity | CustObj3                     | Completed Activities  | M-M-PRIMARY |
| CustObj3 Contact         | CustObj3                     | Contacts              | M-M         |
| CustObj3 CustObj1        | CustObj3                     | Custom Objects 01     | M-M-PRIMARY |
| CustObj3 CustObj2        | CustObj3                     | Custom Objects 02     | M-M-PRIMARY |
| CustObj3 CustObj3        | CustObj3                     | Custom Objects 03     | M-M-PRIMARY |
| CustObj3 Dealer          | CustObj3                     | Dealers               | M-M         |
| CustObj3 Fund            | CustObj3                     | Fund                  | M-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)    | Object Type |
|--|------------------------------|-----------------------|-------------|
| CustObj3 Fund Request  | CustObj3                     | Fund Requests         | M-M         |
| CustObj3 Household   | CustObj3                     | Households            | M-M         |
| CustObj3 Lead  | CustObj3                     | Leads                 | M-M-PRIMARY |
| CustObj3 MedEd   | CustObj3                     | Event                 | M-M         |
| CustObj3 Note  | CustObj3                     | Notes                 | Child       |
| CustObj3 Open Activity   | CustObj3                     | Open Activities       | M-M-PRIMARY |
| CustObj3 Opportunity   | CustObj3                     | Opportunities         | M-M-PRIMARY |
| CustObj3 Partner   | CustObj3                     | Partner               | M-M         |
| CustObj3 Portfolio   | CustObj3                     | Portfolios            | M-M         |
| CustObj3 Prod  | CustObj3                     | Products              | M-M         |
| CustObj3 Service Request                                       | CustObj3                     | Service Requests      | M-M-PRIMARY |
| CustObj3 Solution  | CustObj3                     | Solutions             | M-M         |
| CustObj3 Team  | CustObj3                     | Custom Object 03 Team | Child       |
| CustObj3 Vehicle   | CustObj3                     | Vehicles              | M-M         |
| Custom Object 1 Accreditation ( Custom Object 1 Id )           | CustObj1                     | Accreditations        | 1-M         |
| Custom Object 1 Certification ( Custom Object 1 Id )           | CustObj1                     | Certifications        | 1-M         |
| Custom Object 1 Course ( Custom Object 1 Id )                  | CustObj1                     | Courses               | 1-M         |
| Custom Object 1 CRMOD_LS_Transactions ( Custom Object 1 Id )   | CustObj1                     | Sample Transactions   | 1-M         |
| Custom Object 1 CRMODLS_InventoryPeriod ( Custom Object 1 Id ) | CustObj1                     | Inventory Periods     | 1-M         |
| Custom Object 1 CRMODLS_SampleLot ( Custom Object 1 Id )       | CustObj1                     | Sample Lots           | 1-M         |
| Custom Object 1 CustomObject10 ( Custom Object 1 Id )          | CustObj1                     | Custom Objects 10     | 1-M-PRIMARY |
| Custom Object 1 CustomObject11 ( Custom Object 1 Id )          | CustObj1                     | Custom Objects 11     | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)          | Object Type |
|--|------------------------------|-----------------------------|-------------|
| Custom Object 1 CustomObject12<br>( Custom Object 1 Id )   | CustObj1                     | Custom Objects 12           | 1-M-PRIMARY |
| Custom Object 1 CustomObject13<br>( Custom Object 1 Id )   | CustObj1                     | Custom Objects 13           | 1-M-PRIMARY |
| Custom Object 1 CustomObject14<br>( Custom Object 1 Id )   | CustObj1                     | Custom Objects 14           | 1-M-PRIMARY |
| Custom Object 1 CustomObject15<br>( Custom Object 1 Id )   | CustObj1                     | Custom Objects 15           | 1-M-PRIMARY |
| Custom Object 1 CustomObject4<br>( Custom Object 1 Id )    | CustObj1                     | Custom Objects 04           | 1-M-PRIMARY |
| Custom Object 1 CustomObject5<br>( Custom Object 1 Id )    | CustObj1                     | Custom Objects 05           | 1-M-PRIMARY |
| Custom Object 1 CustomObject6<br>( Custom Object 1 Id )    | CustObj1                     | Custom Objects 06           | 1-M-PRIMARY |
| Custom Object 1 CustomObject7<br>( Custom Object 1 Id )    | CustObj1                     | Custom Objects 07           | 1-M-PRIMARY |
| Custom Object 1 CustomObject8<br>( Custom Object 1 Id )    | CustObj1                     | Custom Objects 08           | 1-M-PRIMARY |
| Custom Object 1 CustomObject9<br>( Custom Object 1 Id )    | CustObj1                     | Custom Objects 09           | 1-M-PRIMARY |
| Custom Object 1 DealRegistration<br>( Custom Object 1 Id ) | CustObj1                     | Deal Registrations          | 1-M         |
| Custom Object 1 Exam ( Custom<br>Object 1 Id )             | CustObj1                     | Exams                       | 1-M         |
| Custom Object 1 FinancialAccount<br>( Custom Object 1 Id ) | CustObj1                     | Financial Accounts          | 1-M-PRIMARY |
| Custom Object 1 MDFRequest<br>( Custom Object 1 Id )       | CustObj1                     | MDF Requests                | 1-M         |
| Custom Object 1 Policy ( Custom<br>Object 1 Id )           | CustObj1                     | Policies                    | 1-M         |
| Custom Object 1 SPRequest ( Custom<br>Object 1 Id )        | CustObj1                     | Special Pricing<br>Requests | 1-M         |
| Custom Object 2 Accreditation<br>( Custom Object 2 Id )    | CustObj2                     | Accreditations              | 1-M         |
| Custom Object 2 Certification<br>( Custom Object 2 Id )    | CustObj2                     | Certifications              | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|---|------------------------------|---------------------|-------------|
| Custom Object 2 Course ( Custom Object 2 Id )                     | CustObj2                     | Courses             | 1-M         |
| Custom Object 2<br>CRMOD_LS_Transactions ( Custom Object 2 Id )   | CustObj2                     | Sample Transactions | 1-M         |
| Custom Object 2<br>CRMODLS_InventoryPeriod ( Custom Object 2 Id ) | CustObj2                     | Inventory Periods   | 1-M         |
| Custom Object 2<br>CRMODLS_SampleLot ( Custom Object 2 Id )       | CustObj2                     | Sample Lots         | 1-M         |
| Custom Object 2 CustomObject10 ( Custom Object 2 Id )             | CustObj2                     | Custom Objects 10   | 1-M-PRIMARY |
| Custom Object 2 CustomObject11 ( Custom Object 2 Id )             | CustObj2                     | Custom Objects 11   | 1-M-PRIMARY |
| Custom Object 2 CustomObject12 ( Custom Object 2 Id )             | CustObj2                     | Custom Objects 12   | 1-M-PRIMARY |
| Custom Object 2 CustomObject13 ( Custom Object 2 Id )             | CustObj2                     | Custom Objects 13   | 1-M-PRIMARY |
| Custom Object 2 CustomObject14 ( Custom Object 2 Id )             | CustObj2                     | Custom Objects 14   | 1-M-PRIMARY |
| Custom Object 2 CustomObject15 ( Custom Object 2 Id )             | CustObj2                     | Custom Objects 15   | 1-M-PRIMARY |
| Custom Object 2 CustomObject4 ( Custom Object 2 Id )              | CustObj2                     | Custom Objects 04   | 1-M-PRIMARY |
| Custom Object 2 CustomObject5 ( Custom Object 2 Id )              | CustObj2                     | Custom Objects 05   | 1-M-PRIMARY |
| Custom Object 2 CustomObject6 ( Custom Object 2 Id )              | CustObj2                     | Custom Objects 06   | 1-M-PRIMARY |
| Custom Object 2 CustomObject7 ( Custom Object 2 Id )              | CustObj2                     | Custom Objects 07   | 1-M-PRIMARY |
| Custom Object 2 CustomObject8 ( Custom Object 2 Id )              | CustObj2                     | Custom Objects 08   | 1-M-PRIMARY |
| Custom Object 2 CustomObject9 ( Custom Object 2 Id )              | CustObj2                     | Custom Objects 09   | 1-M-PRIMARY |
| Custom Object 2 DealRegistration ( Custom Object 2 Id )           | CustObj2                     | Deal Registrations  | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|--|------------------------------|--------------------------|-------------|
| Custom Object 2 Exam ( Custom Object 2 Id )                    | CustObj2                     | Exams                    | 1-M         |
| Custom Object 2 FinancialAccount ( Custom Object 2 Id )        | CustObj2                     | Financial Accounts       | 1-M-PRIMARY |
| Custom Object 2 MDFRequest ( Custom Object 2 Id )              | CustObj2                     | MDF Requests             | 1-M         |
| Custom Object 2 Policy ( Custom Object 2 Id )                  | CustObj2                     | Policies                 | 1-M         |
| Custom Object 2 SPRequest ( Custom Object 2 Id )               | CustObj2                     | Special Pricing Requests | 1-M         |
| Custom Object 3 Accreditation ( Custom Object 3 Id )           | CustObj3                     | Accreditations           | 1-M         |
| Custom Object 3 Certification ( Custom Object 3 Id )           | CustObj3                     | Certifications           | 1-M         |
| Custom Object 3 Course ( Custom Object 3 Id )                  | CustObj3                     | Courses                  | 1-M         |
| Custom Object 3 CRMOD_LS_Transactions ( Custom Object 3 Id )   | CustObj3                     | Sample Transactions      | 1-M         |
| Custom Object 3 CRMODLS_InventoryPeriod ( Custom Object 3 Id ) | CustObj3                     | Inventory Periods        | 1-M         |
| Custom Object 3 CRMODLS_SampleLot ( Custom Object 3 Id )       | CustObj3                     | Sample Lots              | 1-M         |
| Custom Object 3 CustomObject10 ( Custom Object 3 Id )          | CustObj3                     | Custom Objects 10        | 1-M-PRIMARY |
| Custom Object 3 CustomObject11 ( Custom Object 3 Id )          | CustObj3                     | Custom Objects 11        | 1-M-PRIMARY |
| Custom Object 3 CustomObject12 ( Custom Object 3 Id )          | CustObj3                     | Custom Objects 12        | 1-M-PRIMARY |
| Custom Object 3 CustomObject13 ( Custom Object 3 Id )          | CustObj3                     | Custom Objects 13        | 1-M-PRIMARY |
| Custom Object 3 CustomObject14 ( Custom Object 3 Id )          | CustObj3                     | Custom Objects 14        | 1-M-PRIMARY |
| Custom Object 3 CustomObject15 ( Custom Object 3 Id )          | CustObj3                     | Custom Objects 15        | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)          | Object Type |
|--|------------------------------|-----------------------------|-------------|
| Custom Object 3 CustomObject4<br>( Custom Object 3 Id )    | CustObj3                     | Custom Objects 04           | 1-M-PRIMARY |
| Custom Object 3 CustomObject5<br>( Custom Object 3 Id )    | CustObj3                     | Custom Objects 05           | 1-M-PRIMARY |
| Custom Object 3 CustomObject6<br>( Custom Object 3 Id )    | CustObj3                     | Custom Objects 06           | 1-M-PRIMARY |
| Custom Object 3 CustomObject7<br>( Custom Object 3 Id )    | CustObj3                     | Custom Objects 07           | 1-M-PRIMARY |
| Custom Object 3 CustomObject8<br>( Custom Object 3 Id )    | CustObj3                     | Custom Objects 08           | 1-M-PRIMARY |
| Custom Object 3 CustomObject9<br>( Custom Object 3 Id )    | CustObj3                     | Custom Objects 09           | 1-M-PRIMARY |
| Custom Object 3 DealRegistration<br>( Custom Object 3 Id ) | CustObj3                     | Deal Registrations          | 1-M         |
| Custom Object 3 Exam ( Custom<br>Object 3 Id )             | CustObj3                     | Exams                       | 1-M         |
| Custom Object 3 FinancialAccount<br>( Custom Object 3 Id ) | CustObj3                     | Financial Accounts          | 1-M-PRIMARY |
| Custom Object 3 MDFRequest<br>( Custom Object 3 Id )       | CustObj3                     | MDF Requests                | 1-M         |
| Custom Object 3 Policy ( Custom<br>Object 3 Id )           | CustObj3                     | Policies                    | 1-M         |
| Custom Object 3 SPRequest ( Custom<br>Object 3 Id )        | CustObj3                     | Special Pricing<br>Requests | 1-M         |
| CustomObject10   | Not applicable               | Custom Objects 10           | Top         |
| CustomObject10 Account<br>( CustomObject10 Id )            | CustomObject10               | Accounts                    | 1-M         |
| CustomObject10 Accreditation<br>( CustomObject10 Id )      | CustomObject10               | Accreditations              | 1-M         |
| CustomObject10 Activity<br>( CustomObject10 Id )           | CustomObject10               | Activities                  | 1-M-PRIMARY |
| CustomObject10 Asset<br>( CustomObject10 Id )              | CustomObject10               | Assets                      | 1-M         |
| CustomObject10 Campaign<br>( CustomObject10 Id )           | CustomObject10               | Campaigns                   | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|--|------------------------------|---------------------|-------------|
| CustomObject10 Certification<br>( CustomObject10 Id )              | CustomObject10               | Certifications      | 1-M         |
| CustomObject10 Channel Partner<br>( CustomObject10 Id )            | CustomObject10               | Dealers             | 1-M         |
| CustomObject10 Cmpltd Activity                                     | CustomObject10               | Activities          | 1-M-PRIMARY |
| CustomObject10 Contact<br>( CustomObject10 Id )                    | CustomObject10               | Contacts            | 1-M         |
| CustomObject10 Course<br>( CustomObject10 Id )                     | CustomObject10               | Courses             | 1-M         |
| CustomObject10<br>CRMOD_LS_Transactions<br>( CustomObject10 Id )   | CustomObject10               | Sample Transactions | 1-M         |
| CustomObject10<br>CRMODLS_InventoryPeriod<br>( CustomObject10 Id ) | CustomObject10               | Inventory Periods   | 1-M         |
| CustomObject10<br>CRMODLS_SampleLot<br>( CustomObject10 Id )       | CustomObject10               | Sample Lots         | 1-M         |
| CustomObject10 Custom Object 1<br>( CustomObject10 Id )            | CustomObject10               | Custom Objects 01   | 1-M-PRIMARY |
| CustomObject10 Custom Object 2<br>( CustomObject10 Id )            | CustomObject10               | Custom Objects 02   | 1-M-PRIMARY |
| CustomObject10 Custom Object 3<br>( CustomObject10 Id )            | CustomObject10               | Custom Objects 03   | 1-M-PRIMARY |
| CustomObject10 CustomObject10<br>( CustomObject10 Id )             | CustomObject10               | Custom Objects 10   | 1-M-PRIMARY |
| CustomObject10 CustomObject11<br>( CustomObject10 Id )             | CustomObject10               | Custom Objects 11   | 1-M-PRIMARY |
| CustomObject10 CustomObject12<br>( CustomObject10 Id )             | CustomObject10               | Custom Objects 12   | 1-M-PRIMARY |
| CustomObject10 CustomObject13<br>( CustomObject10 Id )             | CustomObject10               | Custom Objects 13   | 1-M-PRIMARY |
| CustomObject10 CustomObject14<br>( CustomObject10 Id )             | CustomObject10               | Custom Objects 14   | 1-M-PRIMARY |
| CustomObject10 CustomObject15<br>( CustomObject10 Id )             | CustomObject10               | Custom Objects 15   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                       | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject10 CustomObject4<br>( CustomObject10 Id )    | CustomObject10               | Custom Objects 04  | 1-M-PRIMARY |
| CustomObject10 CustomObject5<br>( CustomObject10 Id )    | CustomObject10               | Custom Objects 05  | 1-M-PRIMARY |
| CustomObject10 CustomObject6<br>( CustomObject10 Id )    | CustomObject10               | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject10 CustomObject7<br>( CustomObject10 Id )    | CustomObject10               | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject10 CustomObject8<br>( CustomObject10 Id )    | CustomObject10               | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject10 CustomObject9<br>( CustomObject10 Id )    | CustomObject10               | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject10 DealRegistration<br>( CustomObject10 Id ) | CustomObject10               | Deal Registrations | 1-M         |
| CustomObject10 Exam<br>( CustomObject10 Id )             | CustomObject10               | Exams              | 1-M         |
| CustomObject10 FinancialAccount<br>( CustomObject10 Id ) | CustomObject10               | Financial Accounts | 1-M-PRIMARY |
| CustomObject10 Fund<br>( CustomObject10 Id )             | CustomObject10               | Funds              | 1-M         |
| CustomObject10 Fund Request<br>( CustomObject10 Id )     | CustomObject10               | Fund Requests      | 1-M         |
| CustomObject10 Household<br>( CustomObject10 Id )        | CustomObject10               | Households         | 1-M         |
| CustomObject10 Lead<br>( CustomObject10 Id )             | CustomObject10               | Leads              | 1-M-PRIMARY |
| CustomObject10 MDFRequest<br>( CustomObject10 Id )       | CustomObject10               | MDF Requests       | 1-M         |
| CustomObject10 MedEdEvent<br>( CustomObject10 Id )       | CustomObject10               | Events             | 1-M         |
| CustomObject10 Opportunity<br>( CustomObject10 Id )      | CustomObject10               | Opportunities      | 1-M-PRIMARY |
| CustomObject10 Partner<br>( CustomObject10 Id )          | CustomObject10               | Partners           | 1-M         |
| CustomObject10 Policy<br>( CustomObject10 Id )           | CustomObject10               | Policies           | 1-M         |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                      | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| CustomObject10 Portfolio<br>( CustomObject10 Id )       | CustomObject10               | Portfolios               | 1-M         |
| CustomObject10 Product<br>( CustomObject10 Id )         | CustomObject10               | Products                 | Child       |
| CustomObject10 Program<br>( CustomObject10 Id )         | CustomObject10               | Partner Programs         | 1-M         |
| CustomObject10 Revenue<br>( CustomObject10 Id )         | CustomObject10               | Revenues                 | Child       |
| CustomObject10 Service Request<br>( CustomObject10 Id ) | CustomObject10               | Service Requests         | 1-M-PRIMARY |
| CustomObject10 SmartCall<br>( CustomObject10 Id )       | CustomObject10               | Smart Calls              | 1-M         |
| CustomObject10 Solution<br>( CustomObject10 Id )        | CustomObject10               | Solutions                | 1-M         |
| CustomObject10 SPRequest<br>( CustomObject10 Id )       | CustomObject10               | Special Pricing Requests | 1-M         |
| CustomObject10 Vehicle<br>( CustomObject10 Id )         | CustomObject10               | Vehicles                 | 1-M         |
| CustomObject10/Audit Trail Item 2                       | CustomObject10               | Audit Trail              | ReadOnly    |
| CustomObject10/CustomObject10 Book                      | CustomObject10               | Books                    | Child       |
| CustomObject10/<br>CustomObject10Team                   | CustomObject10               | Custom Object 10 Teams   | Child       |
| CustomObject11  | Not applicable               | Custom Objects 11        | Top         |
| CustomObject11 Account<br>( CustomObject11 Id )         | CustomObject11               | Accounts                 | 1-M         |
| CustomObject11 Accreditation<br>( CustomObject11 Id )   | CustomObject11               | Accreditations           | 1-M         |
| CustomObject11 Activity<br>( CustomObject11 Id )        | CustomObject11               | Activities               | 1-M-PRIMARY |
| CustomObject11 Asset<br>( CustomObject11 Id )           | CustomObject11               | Assets                   | 1-M         |
| CustomObject11 Campaign<br>( CustomObject11 Id )        | CustomObject11               | Campaigns                | 1-M         |
| CustomObject11 Certification<br>( CustomObject11 Id )   | CustomObject11               | Certifications           | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|--|------------------------------|---------------------|-------------|
| CustomObject11 Channel Partner<br>( CustomObject11 Id )            | CustomObject11               | Dealers             | 1-M         |
| CustomObject11 Cmpltd Activity                                     | CustomObject11               | Activities          | 1-M-PRIMARY |
| CustomObject11 Contact<br>( CustomObject11 Id )                    | CustomObject11               | Contacts            | 1-M         |
| CustomObject11 Course<br>( CustomObject11 Id )                     | CustomObject11               | Courses             | 1-M         |
| CustomObject11<br>CRMOD_LS_Transactions<br>( CustomObject11 Id )   | CustomObject11               | Sample Transactions | 1-M         |
| CustomObject11<br>CRMODLS_InventoryPeriod<br>( CustomObject11 Id ) | CustomObject11               | Inventory Periods   | 1-M         |
| CustomObject11<br>CRMODLS_SampleLot<br>( CustomObject11 Id )       | CustomObject11               | Sample Lots         | 1-M         |
| CustomObject11 Custom Object 1<br>( CustomObject11 Id )            | CustomObject11               | Custom Objects 01   | 1-M-PRIMARY |
| CustomObject11 Custom Object 2<br>( CustomObject11 Id )            | CustomObject11               | Custom Objects 02   | 1-M-PRIMARY |
| CustomObject11 Custom Object 3<br>( CustomObject11 Id )            | CustomObject11               | Custom Objects 03   | 1-M-PRIMARY |
| CustomObject11 CustomObject10<br>( CustomObject11 Id )             | CustomObject11               | Custom Objects 10   | 1-M-PRIMARY |
| CustomObject11 CustomObject11<br>( CustomObject11 Id )             | CustomObject11               | Custom Objects 11   | 1-M-PRIMARY |
| CustomObject11 CustomObject12<br>( CustomObject11 Id )             | CustomObject11               | Custom Objects 12   | 1-M-PRIMARY |
| CustomObject11 CustomObject13<br>( CustomObject11 Id )             | CustomObject11               | Custom Objects 13   | 1-M-PRIMARY |
| CustomObject11 CustomObject14<br>( CustomObject11 Id )             | CustomObject11               | Custom Objects 14   | 1-M-PRIMARY |
| CustomObject11 CustomObject15<br>( CustomObject11 Id )             | CustomObject11               | Custom Objects 15   | 1-M-PRIMARY |
| CustomObject11 CustomObject4<br>( CustomObject11 Id )              | CustomObject11               | Custom Objects 04   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                       | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject11 CustomObject5<br>( CustomObject11 Id )    | CustomObject11               | Custom Objects 05  | 1-M-PRIMARY |
| CustomObject11 CustomObject6<br>( CustomObject11 Id )    | CustomObject11               | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject11 CustomObject7<br>( CustomObject11 Id )    | CustomObject11               | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject11 CustomObject8<br>( CustomObject11 Id )    | CustomObject11               | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject11 CustomObject9<br>( CustomObject11 Id )    | CustomObject11               | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject11 DealRegistration<br>( CustomObject11 Id ) | CustomObject11               | Deal Registrations | 1-M         |
| CustomObject11 Exam<br>( CustomObject11 Id )             | CustomObject11               | Exams              | 1-M         |
| CustomObject11 FinancialAccount<br>( CustomObject11 Id ) | CustomObject11               | Financial Accounts | 1-M-PRIMARY |
| CustomObject11 Fund<br>( CustomObject11 Id )             | CustomObject11               | Funds              | 1-M         |
| CustomObject11 Fund Request<br>( CustomObject11 Id )     | CustomObject11               | Fund Requests      | 1-M         |
| CustomObject11 Household<br>( CustomObject11 Id )        | CustomObject11               | Households         | 1-M         |
| CustomObject11 Lead<br>( CustomObject11 Id )             | CustomObject11               | Leads              | 1-M-PRIMARY |
| CustomObject11 MDFRequest<br>( CustomObject11 Id )       | CustomObject11               | MDF Requests       | 1-M         |
| CustomObject11 MedEdEvent<br>( CustomObject11 Id )       | CustomObject11               | Events             | 1-M         |
| CustomObject11 Opportunity<br>( CustomObject11 Id )      | CustomObject11               | Opportunities      | 1-M-PRIMARY |
| CustomObject11 Partner<br>( CustomObject11 Id )          | CustomObject11               | Partners           | 1-M         |
| CustomObject11 Policy<br>( CustomObject11 Id )           | CustomObject11               | Policies           | 1-M         |
| CustomObject11 Portfolio<br>( CustomObject11 Id )        | CustomObject11               | Portfolios         | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                      | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| CustomObject11 Product<br>( CustomObject11 Id )         | CustomObject11               | Products                 | Child       |
| CustomObject11 Program<br>( CustomObject11 Id )         | CustomObject11               | Partner Programs         | 1-M         |
| CustomObject11 Revenue<br>( CustomObject11 Id )         | CustomObject11               | Revenues                 | Child       |
| CustomObject11 Service Request<br>( CustomObject11 Id ) | CustomObject11               | Service Requests         | 1-M-PRIMARY |
| CustomObject11 SmartCall<br>( CustomObject11 Id )       | CustomObject11               | Smart Calls              | 1-M         |
| CustomObject11 Solution<br>( CustomObject11 Id )        | CustomObject11               | Solutions                | 1-M         |
| CustomObject11 SPRequest<br>( CustomObject11 Id )       | CustomObject11               | Special Pricing Requests | 1-M         |
| CustomObject11 Vehicle<br>( CustomObject11 Id )         | CustomObject11               | Vehicles                 | 1-M         |
| CustomObject11/Audit Trail Item 2                       | CustomObject11               | Audit Trail              | ReadOnly    |
| CustomObject11/CustomObject11 Book                      | CustomObject11               | Books                    | Child       |
| CustomObject11/<br>CustomObject11Team                   | CustomObject11               | Custom Object 11 Teams   | Child       |
| CustomObject12  | Not applicable               | Custom Objects 12        | Top         |
| CustomObject12 Account<br>( CustomObject12 Id )         | CustomObject12               | Accounts                 | 1-M         |
| CustomObject12 Accreditation<br>( CustomObject12 Id )   | CustomObject12               | Accreditations           | 1-M         |
| CustomObject12 Activity<br>( CustomObject12 Id )        | CustomObject12               | Activities               | 1-M-PRIMARY |
| CustomObject12 Asset<br>( CustomObject12 Id )           | CustomObject12               | Assets                   | 1-M         |
| CustomObject12 Campaign<br>( CustomObject12 Id )        | CustomObject12               | Campaigns                | 1-M         |
| CustomObject12 Certification<br>( CustomObject12 Id )   | CustomObject12               | Certifications           | 1-M         |
| CustomObject12 Channel Partner<br>( CustomObject12 Id ) | CustomObject12               | Dealers                  | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|--|------------------------------|---------------------|-------------|
| CustomObject12 Cmpltd Activity                                     | CustomObject12               | Activities          | 1-M-PRIMARY |
| CustomObject12 Contact<br>( CustomObject12 Id )                    | CustomObject12               | Contacts            | 1-M         |
| CustomObject12 Course<br>( CustomObject12 Id )                     | CustomObject12               | Courses             | 1-M         |
| CustomObject12<br>CRMOD_LS_Transactions<br>( CustomObject12 Id )   | CustomObject12               | Sample Transactions | 1-M         |
| CustomObject12<br>CRMODLS_InventoryPeriod<br>( CustomObject12 Id ) | CustomObject12               | Inventory Periods   | 1-M         |
| CustomObject12<br>CRMODLS_SampleLot<br>( CustomObject12 Id )       | CustomObject12               | Sample Lots         | 1-M         |
| CustomObject12 Custom Object 1<br>( CustomObject12 Id )            | CustomObject12               | Custom Objects 01   | 1-M-PRIMARY |
| CustomObject12 Custom Object 2<br>( CustomObject12 Id )            | CustomObject12               | Custom Objects 02   | 1-M-PRIMARY |
| CustomObject12 Custom Object 3<br>( CustomObject12 Id )            | CustomObject12               | Custom Objects 03   | 1-M-PRIMARY |
| CustomObject12 CustomObject10<br>( CustomObject12 Id )             | CustomObject12               | Custom Objects 10   | 1-M-PRIMARY |
| CustomObject12 CustomObject11<br>( CustomObject12 Id )             | CustomObject12               | Custom Objects 11   | 1-M-PRIMARY |
| CustomObject12 CustomObject12<br>( CustomObject12 Id )             | CustomObject12               | Custom Objects 12   | 1-M-PRIMARY |
| CustomObject12 CustomObject13<br>( CustomObject12 Id )             | CustomObject12               | Custom Objects 13   | 1-M-PRIMARY |
| CustomObject12 CustomObject14<br>( CustomObject12 Id )             | CustomObject12               | Custom Objects 14   | 1-M-PRIMARY |
| CustomObject12 CustomObject15<br>( CustomObject12 Id )             | CustomObject12               | Custom Objects 15   | 1-M-PRIMARY |
| CustomObject12 CustomObject4<br>( CustomObject12 Id )              | CustomObject12               | Custom Objects 04   | 1-M-PRIMARY |
| CustomObject12 CustomObject5<br>( CustomObject12 Id )              | CustomObject12               | Custom Objects 05   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                       | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject12 CustomObject6<br>( CustomObject12 Id )    | CustomObject12               | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject12 CustomObject7<br>( CustomObject12 Id )    | CustomObject12               | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject12 CustomObject8<br>( CustomObject12 Id )    | CustomObject12               | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject12 CustomObject9<br>( CustomObject12 Id )    | CustomObject12               | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject12 DealRegistration<br>( CustomObject12 Id ) | CustomObject12               | Deal Registrations | 1-M         |
| CustomObject12 Exam<br>( CustomObject12 Id )             | CustomObject12               | Exams              | 1-M         |
| CustomObject12 FinancialAccount<br>( CustomObject12 Id ) | CustomObject12               | Financial Accounts | 1-M-PRIMARY |
| CustomObject12 Fund<br>( CustomObject12 Id )             | CustomObject12               | Funds              | 1-M         |
| CustomObject12 Fund Request<br>( CustomObject12 Id )     | CustomObject12               | Fund Requests      | 1-M         |
| CustomObject12 Household<br>( CustomObject12 Id )        | CustomObject12               | Households         | 1-M         |
| CustomObject12 Lead<br>( CustomObject12 Id )             | CustomObject12               | Leads              | 1-M-PRIMARY |
| CustomObject12 MDFRequest<br>( CustomObject12 Id )       | CustomObject12               | MDF Requests       | 1-M         |
| CustomObject12 MedEdEvent<br>( CustomObject12 Id )       | CustomObject12               | Events             | 1-M         |
| CustomObject12 Opportunity<br>( CustomObject12 Id )      | CustomObject12               | Opportunities      | 1-M-PRIMARY |
| CustomObject12 Partner<br>( CustomObject12 Id )          | CustomObject12               | Partners           | 1-M         |
| CustomObject12 Policy<br>( CustomObject12 Id )           | CustomObject12               | Policies           | 1-M         |
| CustomObject12 Portfolio<br>( CustomObject12 Id )        | CustomObject12               | Portfolios         | 1-M         |
| CustomObject12 Product<br>( CustomObject12 Id )          | CustomObject12               | Products           | Child       |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                      | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| CustomObject12 Program<br>( CustomObject12 Id )         | CustomObject12               | Partner Programs         | 1-M         |
| CustomObject12 Revenue<br>( CustomObject12 Id )         | CustomObject12               | Revenues                 | Child       |
| CustomObject12 Service Request<br>( CustomObject12 Id ) | CustomObject12               | Service Requests         | 1-M-PRIMARY |
| CustomObject12 SmartCall<br>( CustomObject12 Id )       | CustomObject12               | Smart Calls              | 1-M         |
| CustomObject12 Solution<br>( CustomObject12 Id )        | CustomObject12               | Solutions                | 1-M         |
| CustomObject12 SPRequest<br>( CustomObject12 Id )       | CustomObject12               | Special Pricing Requests | 1-M         |
| CustomObject12 Vehicle<br>( CustomObject12 Id )         | CustomObject12               | Vehicles                 | 1-M         |
| CustomObject12/Audit Trail Item 2                       | CustomObject12               | Audit Trail              | ReadOnly    |
| CustomObject12/CustomObject12 Book                      | CustomObject12               | Books                    | Child       |
| CustomObject12/<br>CustomObject12Team                   | CustomObject12               | Custom Object 12 Teams   | Child       |
| CustomObject13  | Not applicable               | Custom Objects 13        | Top         |
| CustomObject13 Account<br>( CustomObject13 Id )         | CustomObject13               | Accounts                 | 1-M         |
| CustomObject13 Accreditation<br>( CustomObject13 Id )   | CustomObject13               | Accreditations           | 1-M         |
| CustomObject13 Activity<br>( CustomObject13 Id )        | CustomObject13               | Activities               | 1-M-PRIMARY |
| CustomObject13 Asset<br>( CustomObject13 Id )           | CustomObject13               | Assets                   | 1-M         |
| CustomObject13 Campaign<br>( CustomObject13 Id )        | CustomObject13               | Campaigns                | 1-M         |
| CustomObject13 Certification<br>( CustomObject13 Id )   | CustomObject13               | Certifications           | 1-M         |
| CustomObject13 Channel Partner<br>( CustomObject13 Id ) | CustomObject13               | Dealers                  | 1-M         |
| CustomObject13 Cmpltd Activity                          | CustomObject13               | Activities               | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|--|------------------------------|---------------------|-------------|
| CustomObject13 Contact<br>( CustomObject13 Id )                    | CustomObject13               | Contacts            | 1-M         |
| CustomObject13 Course<br>( CustomObject13 Id )                     | CustomObject13               | Courses             | 1-M         |
| CustomObject13<br>CRMOD_LS_Transactions<br>( CustomObject13 Id )   | CustomObject13               | Sample Transactions | 1-M         |
| CustomObject13<br>CRMODLS_InventoryPeriod<br>( CustomObject13 Id ) | CustomObject13               | Inventory Periods   | 1-M         |
| CustomObject13<br>CRMODLS_SampleLot<br>( CustomObject13 Id )       | CustomObject13               | Sample Lots         | 1-M         |
| CustomObject13 Custom Object 1<br>( CustomObject13 Id )            | CustomObject13               | Custom Objects 01   | 1-M-PRIMARY |
| CustomObject13 Custom Object 2<br>( CustomObject13 Id )            | CustomObject13               | Custom Objects 02   | 1-M-PRIMARY |
| CustomObject13 Custom Object 3<br>( CustomObject13 Id )            | CustomObject13               | Custom Objects 03   | 1-M-PRIMARY |
| CustomObject13 CustomObject10<br>( CustomObject13 Id )             | CustomObject13               | Custom Objects 10   | 1-M-PRIMARY |
| CustomObject13 CustomObject11<br>( CustomObject13 Id )             | CustomObject13               | Custom Objects 11   | 1-M-PRIMARY |
| CustomObject13 CustomObject12<br>( CustomObject13 Id )             | CustomObject13               | Custom Objects 12   | 1-M-PRIMARY |
| CustomObject13 CustomObject13<br>( CustomObject13 Id )             | CustomObject13               | Custom Objects 13   | 1-M-PRIMARY |
| CustomObject13 CustomObject14<br>( CustomObject13 Id )             | CustomObject13               | Custom Objects 14   | 1-M-PRIMARY |
| CustomObject13 CustomObject15<br>( CustomObject13 Id )             | CustomObject13               | Custom Objects 15   | 1-M-PRIMARY |
| CustomObject13 CustomObject4<br>( CustomObject13 Id )              | CustomObject13               | Custom Objects 04   | 1-M-PRIMARY |
| CustomObject13 CustomObject5<br>( CustomObject13 Id )              | CustomObject13               | Custom Objects 05   | 1-M-PRIMARY |
| CustomObject13 CustomObject6<br>( CustomObject13 Id )              | CustomObject13               | Custom Objects 06   | 1-M-PRIMARY |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                       | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject13 CustomObject7<br>( CustomObject13 Id )    | CustomObject13               | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject13 CustomObject8<br>( CustomObject13 Id )    | CustomObject13               | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject13 CustomObject9<br>( CustomObject13 Id )    | CustomObject13               | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject13 DealRegistration<br>( CustomObject13 Id ) | CustomObject13               | Deal Registrations | 1-M         |
| CustomObject13 Exam<br>( CustomObject13 Id )             | CustomObject13               | Exams              | 1-M         |
| CustomObject13 FinancialAccount<br>( CustomObject13 Id ) | CustomObject13               | Financial Accounts | 1-M-PRIMARY |
| CustomObject13 Fund<br>( CustomObject13 Id )             | CustomObject13               | Funds              | 1-M         |
| CustomObject13 Fund Request<br>( CustomObject13 Id )     | CustomObject13               | Fund Requests      | 1-M         |
| CustomObject13 Household<br>( CustomObject13 Id )        | CustomObject13               | Households         | 1-M         |
| CustomObject13 Lead<br>( CustomObject13 Id )             | CustomObject13               | Leads              | 1-M-PRIMARY |
| CustomObject13 MDFRequest<br>( CustomObject13 Id )       | CustomObject13               | MDF Requests       | 1-M         |
| CustomObject13 MedEdEvent<br>( CustomObject13 Id )       | CustomObject13               | Events             | 1-M         |
| CustomObject13 Opportunity<br>( CustomObject13 Id )      | CustomObject13               | Opportunities      | 1-M-PRIMARY |
| CustomObject13 Partner<br>( CustomObject13 Id )          | CustomObject13               | Partners           | 1-M         |
| CustomObject13 Policy<br>( CustomObject13 Id )           | CustomObject13               | Policies           | 1-M         |
| CustomObject13 Portfolio<br>( CustomObject13 Id )        | CustomObject13               | Portfolios         | 1-M         |
| CustomObject13 Product<br>( CustomObject13 Id )          | CustomObject13               | Products           | Child       |
| CustomObject13 Program<br>( CustomObject13 Id )          | CustomObject13               | Partner Programs   | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                      | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| CustomObject13 Revenue<br>( CustomObject13 Id )         | CustomObject13               | Revenues                 | Child       |
| CustomObject13 Service Request<br>( CustomObject13 Id ) | CustomObject13               | Service Requests         | 1-M-PRIMARY |
| CustomObject13 SmartCall<br>( CustomObject13 Id )       | CustomObject13               | Smart Calls              | 1-M         |
| CustomObject13 Solution<br>( CustomObject13 Id )        | CustomObject13               | Solutions                | 1-M         |
| CustomObject13 SPRequest<br>( CustomObject13 Id )       | CustomObject13               | Special Pricing Requests | 1-M         |
| CustomObject13 Vehicle<br>( CustomObject13 Id )         | CustomObject13               | Vehicles                 | 1-M         |
| CustomObject13/Audit Trail Item 2                       | CustomObject13               | Audit Trail              | ReadOnly    |
| CustomObject13/CustomObject13 Book                      | CustomObject13               | Books                    | Child       |
| CustomObject13/<br>CustomObject13Team                   | CustomObject13               | Custom Object 13 Teams   | Child       |
| CustomObject14  | Not applicable               | Custom Objects 14        | Top         |
| CustomObject14 Account<br>( CustomObject14 Id )         | CustomObject14               | Accounts                 | 1-M         |
| CustomObject14 Accreditation<br>( CustomObject14 Id )   | CustomObject14               | Accreditations           | 1-M         |
| CustomObject14 Activity<br>( CustomObject14 Id )        | CustomObject14               | Activities               | 1-M-PRIMARY |
| CustomObject14 Asset<br>( CustomObject14 Id )           | CustomObject14               | Assets                   | 1-M         |
| CustomObject14 Campaign<br>( CustomObject14 Id )        | CustomObject14               | Campaigns                | 1-M         |
| CustomObject14 Certification<br>( CustomObject14 Id )   | CustomObject14               | Certifications           | 1-M         |
| CustomObject14 Channel Partner<br>( CustomObject14 Id ) | CustomObject14               | Dealers                  | 1-M         |
| CustomObject14 Cmpltd Activity                          | CustomObject14               | Activities               | 1-M-PRIMARY |
| CustomObject14 Contact<br>( CustomObject14 Id )         | CustomObject14               | Contacts                 | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|--|------------------------------|---------------------|-------------|
| CustomObject14 Course<br>( CustomObject14 Id )                     | CustomObject14               | Courses             | 1-M         |
| CustomObject14<br>CRMOD_LS_Transactions<br>( CustomObject14 Id )   | CustomObject14               | Sample Transactions | 1-M         |
| CustomObject14<br>CRMODLS_InventoryPeriod<br>( CustomObject14 Id ) | CustomObject14               | Inventory Periods   | 1-M         |
| CustomObject14<br>CRMODLS_SampleLot<br>( CustomObject14 Id )       | CustomObject14               | Sample Lots         | 1-M         |
| CustomObject14 Custom Object 1<br>( CustomObject14 Id )            | CustomObject14               | Custom Objects 01   | 1-M-PRIMARY |
| CustomObject14 Custom Object 2<br>( CustomObject14 Id )            | CustomObject14               | Custom Objects 02   | 1-M-PRIMARY |
| CustomObject14 Custom Object 3<br>( CustomObject14 Id )            | CustomObject14               | Custom Objects 03   | 1-M-PRIMARY |
| CustomObject14 CustomObject10<br>( CustomObject14 Id )             | CustomObject14               | Custom Objects 10   | 1-M-PRIMARY |
| CustomObject14 CustomObject11<br>( CustomObject14 Id )             | CustomObject14               | Custom Objects 11   | 1-M-PRIMARY |
| CustomObject14 CustomObject12<br>( CustomObject14 Id )             | CustomObject14               | Custom Objects 12   | 1-M-PRIMARY |
| CustomObject14 CustomObject13<br>( CustomObject14 Id )             | CustomObject14               | Custom Objects 13   | 1-M-PRIMARY |
| CustomObject14 CustomObject14<br>( CustomObject14 Id )             | CustomObject14               | Custom Objects 14   | 1-M-PRIMARY |
| CustomObject14 CustomObject15<br>( CustomObject14 Id )             | CustomObject14               | Custom Objects 15   | 1-M-PRIMARY |
| CustomObject14 CustomObject4<br>( CustomObject14 Id )              | CustomObject14               | Custom Objects 04   | 1-M-PRIMARY |
| CustomObject14 CustomObject5<br>( CustomObject14 Id )              | CustomObject14               | Custom Objects 05   | 1-M-PRIMARY |
| CustomObject14 CustomObject6<br>( CustomObject14 Id )              | CustomObject14               | Custom Objects 06   | 1-M-PRIMARY |
| CustomObject14 CustomObject7<br>( CustomObject14 Id )              | CustomObject14               | Custom Objects 07   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                       | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject14 CustomObject8<br>( CustomObject14 Id )    | CustomObject14               | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject14 CustomObject9<br>( CustomObject14 Id )    | CustomObject14               | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject14 DealRegistration<br>( CustomObject14 Id ) | CustomObject14               | Deal Registrations | 1-M         |
| CustomObject14 Exam<br>( CustomObject14 Id )             | CustomObject14               | Exams              | 1-M         |
| CustomObject14 FinancialAccount<br>( CustomObject14 Id ) | CustomObject14               | Financial Accounts | 1-M-PRIMARY |
| CustomObject14 Fund<br>( CustomObject14 Id )             | CustomObject14               | Funds              | 1-M         |
| CustomObject14 Fund Request<br>( CustomObject14 Id )     | CustomObject14               | Fund Requests      | 1-M         |
| CustomObject14 Household<br>( CustomObject14 Id )        | CustomObject14               | Households         | 1-M         |
| CustomObject14 Lead<br>( CustomObject14 Id )             | CustomObject14               | Leads              | 1-M-PRIMARY |
| CustomObject14 MDFRequest<br>( CustomObject14 Id )       | CustomObject14               | MDF Requests       | 1-M         |
| CustomObject14 MedEdEvent<br>( CustomObject14 Id )       | CustomObject14               | Events             | 1-M         |
| CustomObject14 Opportunity<br>( CustomObject14 Id )      | CustomObject14               | Opportunities      | 1-M-PRIMARY |
| CustomObject14 Partner<br>( CustomObject14 Id )          | CustomObject14               | Partners           | 1-M         |
| CustomObject14 Policy<br>( CustomObject14 Id )           | CustomObject14               | Policies           | 1-M         |
| CustomObject14 Portfolio<br>( CustomObject14 Id )        | CustomObject14               | Portfolios         | 1-M         |
| CustomObject14 Product<br>( CustomObject14 Id )          | CustomObject14               | Products           | Child       |
| CustomObject14 Program<br>( CustomObject14 Id )          | CustomObject14               | Partner Programs   | 1-M         |
| CustomObject14 Revenue<br>( CustomObject14 Id )          | CustomObject14               | Revenues           | Child       |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                      | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| CustomObject14 Service Request<br>( CustomObject14 Id ) | CustomObject14               | Service Requests         | 1-M-PRIMARY |
| CustomObject14 SmartCall<br>( CustomObject14 Id )       | CustomObject14               | Smart Calls              | 1-M         |
| CustomObject14 Solution<br>( CustomObject14 Id )        | CustomObject14               | Solutions                | 1-M         |
| CustomObject14 SPRequest<br>( CustomObject14 Id )       | CustomObject14               | Special Pricing Requests | 1-M         |
| CustomObject14 Vehicle<br>( CustomObject14 Id )         | CustomObject14               | Vehicles                 | 1-M         |
| CustomObject14/Audit Trail Item 2                       | CustomObject14               | Audit Trail              | ReadOnly    |
| CustomObject14/CustomObject14 Book                      | CustomObject14               | Books                    | Child       |
| CustomObject14/<br>CustomObject14Team                   | CustomObject14               | Custom Object 14 Teams   | Child       |
| CustomObject15  | Not applicable               | Custom Objects 15        | Top         |
| CustomObject15 Account<br>( CustomObject15 Id )         | CustomObject15               | Accounts                 | 1-M         |
| CustomObject15 Accreditation<br>( CustomObject15 Id )   | CustomObject15               | Accreditations           | 1-M         |
| CustomObject15 Activity<br>( CustomObject15 Id )        | CustomObject15               | Activities               | 1-M-PRIMARY |
| CustomObject15 Asset<br>( CustomObject15 Id )           | CustomObject15               | Assets                   | 1-M         |
| CustomObject15 Campaign<br>( CustomObject15 Id )        | CustomObject15               | Campaigns                | 1-M         |
| CustomObject15 Certification<br>( CustomObject15 Id )   | CustomObject15               | Certifications           | 1-M         |
| CustomObject15 Channel Partner<br>( CustomObject15 Id ) | CustomObject15               | Dealers                  | 1-M         |
| CustomObject15 Cmpltd Activity                          | CustomObject15               | Activities               | 1-M-PRIMARY |
| CustomObject15 Contact<br>( CustomObject15 Id )         | CustomObject15               | Contacts                 | 1-M         |
| CustomObject15 Course<br>( CustomObject15 Id )          | CustomObject15               | Courses                  | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|--|------------------------------|---------------------|-------------|
| CustomObject15<br>CRMOD_LS_Transactions<br>( CustomObject15 Id )   | CustomObject15               | Sample Transactions | 1-M         |
| CustomObject15<br>CRMODLS_InventoryPeriod<br>( CustomObject15 Id ) | CustomObject15               | Inventory Periods   | 1-M         |
| CustomObject15<br>CRMODLS_SampleLot<br>( CustomObject15 Id )       | CustomObject15               | Sample Lots         | 1-M         |
| CustomObject15 Custom Object 1<br>( CustomObject15 Id )            | CustomObject15               | Custom Objects 01   | 1-M-PRIMARY |
| CustomObject15 Custom Object 2<br>( CustomObject15 Id )            | CustomObject15               | Custom Objects 02   | 1-M-PRIMARY |
| CustomObject15 Custom Object 3<br>( CustomObject15 Id )            | CustomObject15               | Custom Objects 03   | 1-M-PRIMARY |
| CustomObject15 CustomObject10<br>( CustomObject15 Id )             | CustomObject15               | Custom Objects 10   | 1-M-PRIMARY |
| CustomObject15 CustomObject11<br>( CustomObject15 Id )             | CustomObject15               | Custom Objects 11   | 1-M-PRIMARY |
| CustomObject15 CustomObject12<br>( CustomObject15 Id )             | CustomObject15               | Custom Objects 12   | 1-M-PRIMARY |
| CustomObject15 CustomObject13<br>( CustomObject15 Id )             | CustomObject15               | Custom Objects 13   | 1-M-PRIMARY |
| CustomObject15 CustomObject14<br>( CustomObject15 Id )             | CustomObject15               | Custom Objects 14   | 1-M-PRIMARY |
| CustomObject15 CustomObject15<br>( CustomObject15 Id )             | CustomObject15               | Custom Objects 15   | 1-M-PRIMARY |
| CustomObject15 CustomObject4<br>( CustomObject15 Id )              | CustomObject15               | Custom Objects 04   | 1-M-PRIMARY |
| CustomObject15 CustomObject5<br>( CustomObject15 Id )              | CustomObject15               | Custom Objects 05   | 1-M-PRIMARY |
| CustomObject15 CustomObject6<br>( CustomObject15 Id )              | CustomObject15               | Custom Objects 06   | 1-M-PRIMARY |
| CustomObject15 CustomObject7<br>( CustomObject15 Id )              | CustomObject15               | Custom Objects 07   | 1-M-PRIMARY |
| CustomObject15 CustomObject8<br>( CustomObject15 Id )              | CustomObject15               | Custom Objects 08   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                       | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject15 CustomObject9<br>( CustomObject15 Id )    | CustomObject15               | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject15 DealRegistration<br>( CustomObject15 Id ) | CustomObject15               | Deal Registrations | 1-M         |
| CustomObject15 Exam<br>( CustomObject15 Id )             | CustomObject15               | Exams              | 1-M         |
| CustomObject15 FinancialAccount<br>( CustomObject15 Id ) | CustomObject15               | Financial Accounts | 1-M-PRIMARY |
| CustomObject15 Fund<br>( CustomObject15 Id )             | CustomObject15               | Funds              | 1-M         |
| CustomObject15 Fund Request<br>( CustomObject15 Id )     | CustomObject15               | Fund Requests      | 1-M         |
| CustomObject15 Household<br>( CustomObject15 Id )        | CustomObject15               | Households         | 1-M         |
| CustomObject15 Lead<br>( CustomObject15 Id )             | CustomObject15               | Leads              | 1-M-PRIMARY |
| CustomObject15 MDFRequest<br>( CustomObject15 Id )       | CustomObject15               | MDF Requests       | 1-M         |
| CustomObject15 MedEdEvent<br>( CustomObject15 Id )       | CustomObject15               | Events             | 1-M         |
| CustomObject15 Opportunity<br>( CustomObject15 Id )      | CustomObject15               | Opportunities      | 1-M-PRIMARY |
| CustomObject15 Partner<br>( CustomObject15 Id )          | CustomObject15               | Partners           | 1-M         |
| CustomObject15 Policy<br>( CustomObject15 Id )           | CustomObject15               | Policies           | 1-M         |
| CustomObject15 Portfolio<br>( CustomObject15 Id )        | CustomObject15               | Portfolios         | 1-M         |
| CustomObject15 Product<br>( CustomObject15 Id )          | CustomObject15               | Products           | Child       |
| CustomObject15 Program<br>( CustomObject15 Id )          | CustomObject15               | Partner Programs   | 1-M         |
| CustomObject15 Revenue<br>( CustomObject15 Id )          | CustomObject15               | Revenues           | Child       |
| CustomObject15 Service Request<br>( CustomObject15 Id )  | CustomObject15               | Service Requests   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|--|------------------------------|--------------------------|-------------|
| CustomObject15 SmartCall<br>( CustomObject15 Id )              | CustomObject15               | Smart Calls              | 1-M         |
| CustomObject15 Solution<br>( CustomObject15 Id )               | CustomObject15               | Solutions                | 1-M         |
| CustomObject15 SPRequest<br>( CustomObject15 Id )              | CustomObject15               | Special Pricing Requests | 1-M         |
| CustomObject15 Vehicle<br>( CustomObject15 Id )                | CustomObject15               | Vehicles                 | 1-M         |
| CustomObject15/Audit Trail Item 2                              | CustomObject15               | Audit Trail              | ReadOnly    |
| CustomObject15/CustomObject15 Book                             | CustomObject15               | Books                    | Child       |
| CustomObject15/<br>CustomObject15Team                          | CustomObject15               | Custom Object 15 Teams   | Child       |
| CustomObject4  | Not applicable               | Custom Objects 04        | Top         |
| CustomObject4 Account<br>( CustomObject4 Id )                  | CustomObject4                | Accounts                 | 1-M         |
| CustomObject4 Accreditation<br>( CustomObject4 Id )            | CustomObject4                | Accreditations           | 1-M         |
| CustomObject4 Activity<br>( CustomObject4 Id )                 | CustomObject4                | Activities               | 1-M-PRIMARY |
| CustomObject4 Asset<br>( CustomObject4 Id )                    | CustomObject4                | Assets                   | 1-M         |
| CustomObject4 Campaign<br>( CustomObject4 Id )                 | CustomObject4                | Campaigns                | 1-M         |
| CustomObject4 Certification<br>( CustomObject4 Id )            | CustomObject4                | Certifications           | 1-M         |
| CustomObject4 Channel Partner<br>( CustomObject4 Id )          | CustomObject4                | Dealers                  | 1-M         |
| CustomObject4 Cmpltd Activity                                  | CustomObject4                | Activities               | 1-M-PRIMARY |
| CustomObject4 Contact<br>( CustomObject4 Id )                  | CustomObject4                | Contacts                 | 1-M         |
| CustomObject4 Course<br>( CustomObject4 Id )                   | CustomObject4                | Courses                  | 1-M         |
| CustomObject4<br>CRMOD_LS_Transactions<br>( CustomObject4 Id ) | CustomObject4                | Sample Transactions      | 1-M         |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject4<br>CRMODLS_InventoryPeriod<br>( CustomObject4 Id ) | CustomObject4                | Inventory Periods  | 1-M         |
| CustomObject4 CRMODLS_SampleLot<br>( CustomObject4 Id )          | CustomObject4                | Sample Lots        | 1-M         |
| CustomObject4 Custom Object 1<br>( CustomObject4 Id )            | CustomObject4                | Custom Objects 01  | 1-M-PRIMARY |
| CustomObject4 Custom Object 2<br>( CustomObject4 Id )            | CustomObject4                | Custom Objects 02  | 1-M-PRIMARY |
| CustomObject4 Custom Object 3<br>( CustomObject4 Id )            | CustomObject4                | Custom Objects 03  | 1-M-PRIMARY |
| CustomObject4 CustomObject10<br>( CustomObject4 Id )             | CustomObject4                | Custom Objects 10  | 1-M-PRIMARY |
| CustomObject4 CustomObject11<br>( CustomObject4 Id )             | CustomObject4                | Custom Objects 11  | 1-M-PRIMARY |
| CustomObject4 CustomObject12<br>( CustomObject4 Id )             | CustomObject4                | Custom Objects 12  | 1-M-PRIMARY |
| CustomObject4 CustomObject13<br>( CustomObject4 Id )             | CustomObject4                | Custom Objects 13  | 1-M-PRIMARY |
| CustomObject4 CustomObject14<br>( CustomObject4 Id )             | CustomObject4                | Custom Objects 14  | 1-M-PRIMARY |
| CustomObject4 CustomObject15<br>( CustomObject4 Id )             | CustomObject4                | Custom Objects 15  | 1-M-PRIMARY |
| CustomObject4 CustomObject4<br>( CustomObject4 Id )              | CustomObject4                | Custom Objects 04  | 1-M-PRIMARY |
| CustomObject4 CustomObject5<br>( CustomObject4 Id )              | CustomObject4                | Custom Objects 05  | 1-M-PRIMARY |
| CustomObject4 CustomObject6<br>( CustomObject4 Id )              | CustomObject4                | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject4 CustomObject7<br>( CustomObject4 Id )              | CustomObject4                | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject4 CustomObject8<br>( CustomObject4 Id )              | CustomObject4                | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject4 CustomObject9<br>( CustomObject4 Id )              | CustomObject4                | Custom Objects 09  | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                     | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject4 DealRegistration<br>( CustomObject4 Id ) | CustomObject4                | Deal Registrations | 1-M         |
| CustomObject4 Exam<br>( CustomObject4 Id )             | CustomObject4                | Exams              | 1-M         |
| CustomObject4 FinancialAccount<br>( CustomObject4 Id ) | CustomObject4                | Financial Accounts | 1-M-PRIMARY |
| CustomObject4 Fund ( CustomObject4 Id )                | CustomObject4                | Funds              | 1-M         |
| CustomObject4 Fund Request<br>( CustomObject4 Id )     | CustomObject4                | Fund Requests      | 1-M         |
| CustomObject4 Household<br>( CustomObject4 Id )        | CustomObject4                | Households         | 1-M         |
| CustomObject4 Lead ( CustomObject4 Id )                | CustomObject4                | Leads              | 1-M-PRIMARY |
| CustomObject4 MDFRequest<br>( CustomObject4 Id )       | CustomObject4                | MDF Requests       | 1-M         |
| CustomObject4 MedEdEvent<br>( CustomObject4 Id )       | CustomObject4                | Events             | 1-M         |
| CustomObject4 Opportunity<br>( CustomObject4 Id )      | CustomObject4                | Opportunities      | 1-M-PRIMARY |
| CustomObject4 Partner<br>( CustomObject4 Id )          | CustomObject4                | Partners           | 1-M         |
| CustomObject4 Policy<br>( CustomObject4 Id )           | CustomObject4                | Policies           | 1-M         |
| CustomObject4 Portfolio<br>( CustomObject4 Id )        | CustomObject4                | Portfolios         | 1-M         |
| CustomObject4 Product<br>( CustomObject4 Id )          | CustomObject4                | Products           | Child       |
| CustomObject4 Program<br>( CustomObject4 Id )          | CustomObject4                | Partner Programs   | 1-M         |
| CustomObject4 Revenue<br>( CustomObject4 Id )          | CustomObject4                | Revenues           | Child       |
| CustomObject4 Service Request<br>( CustomObject4 Id )  | CustomObject4                | Service Requests   | 1-M-PRIMARY |
| CustomObject4 SmartCall<br>( CustomObject4 Id )        | CustomObject4                | Smart Calls        | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|--|------------------------------|--------------------------|-------------|
| CustomObject4 Solution<br>( CustomObject4 Id )                   | CustomObject4                | Solutions                | 1-M         |
| CustomObject4 SPRequest<br>( CustomObject4 Id )                  | CustomObject4                | Special Pricing Requests | 1-M         |
| CustomObject4 Vehicle<br>( CustomObject4 Id )                    | CustomObject4                | Vehicles                 | 1-M         |
| CustomObject4/Audit Trail Item 2                                 | CustomObject4                | Audit Trail              | ReadOnly    |
| CustomObject4/CustomObject4 Book                                 | CustomObject4                | Books                    | Child       |
| CustomObject4/CustomObject4Team                                  | CustomObject4                | Custom Object 04 Teams   | Child       |
| CustomObject5  | Not applicable               | Custom Objects 05        | Top         |
| CustomObject5 Account<br>( CustomObject5 Id )                    | CustomObject5                | Accounts                 | 1-M         |
| CustomObject5 Accreditation<br>( CustomObject5 Id )              | CustomObject5                | Accreditations           | 1-M         |
| CustomObject5 Activity<br>( CustomObject5 Id )                   | CustomObject5                | Activities               | 1-M-PRIMARY |
| CustomObject5 Asset<br>( CustomObject5 Id )                      | CustomObject5                | Assets                   | 1-M         |
| CustomObject5 Campaign<br>( CustomObject5 Id )                   | CustomObject5                | Campaigns                | 1-M         |
| CustomObject5 Certification<br>( CustomObject5 Id )              | CustomObject5                | Certifications           | 1-M         |
| CustomObject5 Channel Partner<br>( CustomObject5 Id )            | CustomObject5                | Dealers                  | 1-M         |
| CustomObject5 Cmpltd Activity                                    | CustomObject5                | Activities               | 1-M-PRIMARY |
| CustomObject5 Contact<br>( CustomObject5 Id )                    | CustomObject5                | Contacts                 | 1-M         |
| CustomObject5 Course<br>( CustomObject5 Id )                     | CustomObject5                | Courses                  | 1-M         |
| CustomObject5<br>CRMOD_LS_Transactions<br>( CustomObject5 Id )   | CustomObject5                | Sample Transactions      | 1-M         |
| CustomObject5<br>CRMODLS_InventoryPeriod<br>( CustomObject5 Id ) | CustomObject5                | Inventory Periods        | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                      | Access Object Name of Parent | Display Name (ENU) | Object Type |
|---|------------------------------|--------------------|-------------|
| CustomObject5 CRMODLS_SampleLot<br>( CustomObject5 Id ) | CustomObject5                | Sample Lots        | 1-M         |
| CustomObject5 Custom Object 1<br>( CustomObject5 Id )   | CustomObject5                | Custom Objects 01  | 1-M-PRIMARY |
| CustomObject5 Custom Object 2<br>( CustomObject5 Id )   | CustomObject5                | Custom Objects 02  | 1-M-PRIMARY |
| CustomObject5 Custom Object 3<br>( CustomObject5 Id )   | CustomObject5                | Custom Objects 03  | 1-M-PRIMARY |
| CustomObject5 CustomObject10<br>( CustomObject5 Id )    | CustomObject5                | Custom Objects 10  | 1-M-PRIMARY |
| CustomObject5 CustomObject11<br>( CustomObject5 Id )    | CustomObject5                | Custom Objects 11  | 1-M-PRIMARY |
| CustomObject5 CustomObject12<br>( CustomObject5 Id )    | CustomObject5                | Custom Objects 12  | 1-M-PRIMARY |
| CustomObject5 CustomObject13<br>( CustomObject5 Id )    | CustomObject5                | Custom Objects 13  | 1-M-PRIMARY |
| CustomObject5 CustomObject14<br>( CustomObject5 Id )    | CustomObject5                | Custom Objects 14  | 1-M-PRIMARY |
| CustomObject5 CustomObject15<br>( CustomObject5 Id )    | CustomObject5                | Custom Objects 15  | 1-M-PRIMARY |
| CustomObject5 CustomObject4<br>( CustomObject5 Id )     | CustomObject5                | Custom Objects 04  | 1-M-PRIMARY |
| CustomObject5 CustomObject5<br>( CustomObject5 Id )     | CustomObject5                | Custom Objects 05  | 1-M-PRIMARY |
| CustomObject5 CustomObject6<br>( CustomObject5 Id )     | CustomObject5                | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject5 CustomObject7<br>( CustomObject5 Id )     | CustomObject5                | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject5 CustomObject8<br>( CustomObject5 Id )     | CustomObject5                | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject5 CustomObject9<br>( CustomObject5 Id )     | CustomObject5                | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject5 DealRegistration<br>( CustomObject5 Id )  | CustomObject5                | Deal Registrations | 1-M         |
| CustomObject5 Exam<br>( CustomObject5 Id )              | CustomObject5                | Exams              | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                  | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| CustomObject5 FinancialAccount ( CustomObject5 Id ) | CustomObject5                | Financial Accounts       | 1-M-PRIMARY |
| CustomObject5 Fund ( CustomObject5 Id )             | CustomObject5                | Funds                    | 1-M         |
| CustomObject5 Fund Request ( CustomObject5 Id )     | CustomObject5                | Fund Requests            | 1-M         |
| CustomObject5 Household ( CustomObject5 Id )        | CustomObject5                | Households               | 1-M         |
| CustomObject5 Lead ( CustomObject5 Id )             | CustomObject5                | Leads                    | 1-M-PRIMARY |
| CustomObject5 MDFRequest ( CustomObject5 Id )       | CustomObject5                | MDF Requests             | 1-M         |
| CustomObject5 MedEdEvent ( CustomObject5 Id )       | CustomObject5                | Events                   | 1-M         |
| CustomObject5 Opportunity ( CustomObject5 Id )      | CustomObject5                | Opportunities            | 1-M-PRIMARY |
| CustomObject5 Partner ( CustomObject5 Id )          | CustomObject5                | Partners                 | 1-M         |
| CustomObject5 Policy ( CustomObject5 Id )           | CustomObject5                | Policies                 | 1-M         |
| CustomObject5 Portfolio ( CustomObject5 Id )        | CustomObject5                | Portfolios               | 1-M         |
| CustomObject5 Product ( CustomObject5 Id )          | CustomObject5                | Products                 | Child       |
| CustomObject5 Program ( CustomObject5 Id )          | CustomObject5                | Partner Programs         | 1-M         |
| CustomObject5 Revenue ( CustomObject5 Id )          | CustomObject5                | Revenues                 | Child       |
| CustomObject5 Service Request ( CustomObject5 Id )  | CustomObject5                | Service Requests         | 1-M-PRIMARY |
| CustomObject5 SmartCall ( CustomObject5 Id )        | CustomObject5                | Smart Calls              | 1-M         |
| CustomObject5 Solution ( CustomObject5 Id )         | CustomObject5                | Solutions                | 1-M         |
| CustomObject5 SPRequest ( CustomObject5 Id )        | CustomObject5                | Special Pricing Requests | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)        | Object Type |
|--|------------------------------|---------------------------|-------------|
| CustomObject5 Vehicle<br>( CustomObject5 Id )                    | CustomObject5                | Vehicles                  | 1-M         |
| CustomObject5/Audit Trail Item 2                                 | CustomObject5                | Audit Trail               | ReadOnly    |
| CustomObject5/CustomObject5 Book                                 | CustomObject5                | Books                     | Child       |
| CustomObject5/CustomObject5Team                                  | CustomObject5                | Custom Object 05<br>Teams | Child       |
| CustomObject6  | Not applicable               | Custom Objects 06         | Top         |
| CustomObject6 Account<br>( CustomObject6 Id )                    | CustomObject6                | Accounts                  | 1-M         |
| CustomObject6 Accreditation<br>( CustomObject6 Id )              | CustomObject6                | Accreditations            | 1-M         |
| CustomObject6 Activity<br>( CustomObject6 Id )                   | CustomObject6                | Activities                | 1-M-PRIMARY |
| CustomObject6 Asset<br>( CustomObject6 Id )                      | CustomObject6                | Assets                    | 1-M         |
| CustomObject6 Campaign<br>( CustomObject6 Id )                   | CustomObject6                | Campaigns                 | 1-M         |
| CustomObject6 Certification<br>( CustomObject6 Id )              | CustomObject6                | Certifications            | 1-M         |
| CustomObject6 Channel Partner<br>( CustomObject6 Id )            | CustomObject6                | Dealers                   | 1-M         |
| CustomObject6 Cmpltd Activity                                    | CustomObject6                | Activities                | 1-M-PRIMARY |
| CustomObject6 Contact<br>( CustomObject6 Id )                    | CustomObject6                | Contacts                  | 1-M         |
| CustomObject6 Course<br>( CustomObject6 Id )                     | CustomObject6                | Courses                   | 1-M         |
| CustomObject6<br>CRMOD_LS_Transactions<br>( CustomObject6 Id )   | CustomObject6                | Sample<br>Transactions    | 1-M         |
| CustomObject6<br>CRMODLS_InventoryPeriod<br>( CustomObject6 Id ) | CustomObject6                | Inventory Periods         | 1-M         |
| CustomObject6 CRMODLS_SampleLot<br>( CustomObject6 Id )          | CustomObject6                | Sample Lots               | 1-M         |
| CustomObject6 Custom Object 1<br>( CustomObject6 Id )            | CustomObject6                | Custom Objects 01         | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                  | Access Object Name of Parent | Display Name (ENU) | Object Type |
|---|------------------------------|--------------------|-------------|
| CustomObject6 Custom Object 2 ( CustomObject6 Id )  | CustomObject6                | Custom Objects 02  | 1-M-PRIMARY |
| CustomObject6 Custom Object 3 ( CustomObject6 Id )  | CustomObject6                | Custom Objects 03  | 1-M-PRIMARY |
| CustomObject6 CustomObject10 ( CustomObject6 Id )   | CustomObject6                | Custom Objects 10  | 1-M-PRIMARY |
| CustomObject6 CustomObject11 ( CustomObject6 Id )   | CustomObject6                | Custom Objects 11  | 1-M-PRIMARY |
| CustomObject6 CustomObject12 ( CustomObject6 Id )   | CustomObject6                | Custom Objects 12  | 1-M-PRIMARY |
| CustomObject6 CustomObject13 ( CustomObject6 Id )   | CustomObject6                | Custom Objects 13  | 1-M-PRIMARY |
| CustomObject6 CustomObject14 ( CustomObject6 Id )   | CustomObject6                | Custom Objects 14  | 1-M-PRIMARY |
| CustomObject6 CustomObject15 ( CustomObject6 Id )   | CustomObject6                | Custom Objects 15  | 1-M-PRIMARY |
| CustomObject6 CustomObject4 ( CustomObject6 Id )    | CustomObject6                | Custom Objects 04  | 1-M-PRIMARY |
| CustomObject6 CustomObject5 ( CustomObject6 Id )    | CustomObject6                | Custom Objects 05  | 1-M-PRIMARY |
| CustomObject6 CustomObject6 ( CustomObject6 Id )    | CustomObject6                | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject6 CustomObject7 ( CustomObject6 Id )    | CustomObject6                | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject6 CustomObject8 ( CustomObject6 Id )    | CustomObject6                | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject6 CustomObject9 ( CustomObject6 Id )    | CustomObject6                | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject6 DealRegistration ( CustomObject6 Id ) | CustomObject6                | Deal Registrations | 1-M         |
| CustomObject6 Exam ( CustomObject6 Id )             | CustomObject6                | Exams              | 1-M         |
| CustomObject6 FinancialAccount ( CustomObject6 Id ) | CustomObject6                | Financial Accounts | 1-M-PRIMARY |
| CustomObject6 Fund ( CustomObject6 Id )             | CustomObject6                | Funds              | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                 | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|--|------------------------------|--------------------------|-------------|
| CustomObject6 Fund Request ( CustomObject6 Id )    | CustomObject6                | Fund Requests            | 1-M         |
| CustomObject6 Household ( CustomObject6 Id )       | CustomObject6                | Households               | 1-M         |
| CustomObject6 Lead ( CustomObject6 Id )            | CustomObject6                | Leads                    | 1-M-PRIMARY |
| CustomObject6 MDFRequest ( CustomObject6 Id )      | CustomObject6                | MDF Requests             | 1-M         |
| CustomObject6 MedEdEvent ( CustomObject6 Id )      | CustomObject6                | Events                   | 1-M         |
| CustomObject6 Opportunity ( CustomObject6 Id )     | CustomObject6                | Opportunities            | 1-M-PRIMARY |
| CustomObject6 Partner ( CustomObject6 Id )         | CustomObject6                | Partners                 | 1-M         |
| CustomObject6 Policy ( CustomObject6 Id )          | CustomObject6                | Policies                 | 1-M         |
| CustomObject6 Portfolio ( CustomObject6 Id )       | CustomObject6                | Portfolios               | 1-M         |
| CustomObject6 Product ( CustomObject6 Id )         | CustomObject6                | Products                 | Child       |
| CustomObject6 Program ( CustomObject6 Id )         | CustomObject6                | Partner Programs         | 1-M         |
| CustomObject6 Revenue ( CustomObject6 Id )         | CustomObject6                | Revenues                 | Child       |
| CustomObject6 Service Request ( CustomObject6 Id ) | CustomObject6                | Service Requests         | 1-M-PRIMARY |
| CustomObject6 SmartCall ( CustomObject6 Id )       | CustomObject6                | Smart Calls              | 1-M         |
| CustomObject6 Solution ( CustomObject6 Id )        | CustomObject6                | Solutions                | 1-M         |
| CustomObject6 SPRequest ( CustomObject6 Id )       | CustomObject6                | Special Pricing Requests | 1-M         |
| CustomObject6 Vehicle ( CustomObject6 Id )         | CustomObject6                | Vehicles                 | 1-M         |
| CustomObject6/Audit Trail Item 2                   | CustomObject6                | Audit Trail              | ReadOnly    |
| CustomObject6/CustomObject6 Book                   | CustomObject6                | Books                    | Child       |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)     | Object Type |
|--|------------------------------|------------------------|-------------|
| CustomObject6/CustomObject6Team                            | CustomObject6                | Custom Object 06 Teams | Child       |
| CustomObject7  | Not applicable               | Custom Objects 07      | Top         |
| CustomObject7 Account ( CustomObject7 Id )                 | CustomObject7                | Accounts               | 1-M         |
| CustomObject7 Accreditation ( CustomObject7 Id )           | CustomObject7                | Accreditations         | 1-M         |
| CustomObject7 Activity ( CustomObject7 Id )                | CustomObject7                | Activities             | 1-M-PRIMARY |
| CustomObject7 Asset ( CustomObject7 Id )                   | CustomObject7                | Assets                 | 1-M         |
| CustomObject7 Campaign ( CustomObject7 Id )                | CustomObject7                | Campaigns              | 1-M         |
| CustomObject7 Certification ( CustomObject7 Id )           | CustomObject7                | Certifications         | 1-M         |
| CustomObject7 Channel Partner ( CustomObject7 Id )         | CustomObject7                | Dealers                | 1-M         |
| CustomObject7 Cmpltd Activity                              | CustomObject7                | Activities             | 1-M-PRIMARY |
| CustomObject7 Contact ( CustomObject7 Id )                 | CustomObject7                | Contacts               | 1-M         |
| CustomObject7 Course ( CustomObject7 Id )                  | CustomObject7                | Courses                | 1-M         |
| CustomObject7 CRMOD_LS_Transactions ( CustomObject7 Id )   | CustomObject7                | Sample Transactions    | 1-M         |
| CustomObject7 CRMODLS_InventoryPeriod ( CustomObject7 Id ) | CustomObject7                | Inventory Periods      | 1-M         |
| CustomObject7 CRMODLS_SampleLot ( CustomObject7 Id )       | CustomObject7                | Sample Lots            | 1-M         |
| CustomObject7 Custom Object 1 ( CustomObject7 Id )         | CustomObject7                | Custom Objects 01      | 1-M-PRIMARY |
| CustomObject7 Custom Object 2 ( CustomObject7 Id )         | CustomObject7                | Custom Objects 02      | 1-M-PRIMARY |
| CustomObject7 Custom Object 3 ( CustomObject7 Id )         | CustomObject7                | Custom Objects 03      | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                     | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject7 CustomObject10<br>( CustomObject7 Id )   | CustomObject7                | Custom Objects 10  | 1-M-PRIMARY |
| CustomObject7 CustomObject11<br>( CustomObject7 Id )   | CustomObject7                | Custom Objects 11  | 1-M-PRIMARY |
| CustomObject7 CustomObject12<br>( CustomObject7 Id )   | CustomObject7                | Custom Objects 12  | 1-M-PRIMARY |
| CustomObject7 CustomObject13<br>( CustomObject7 Id )   | CustomObject7                | Custom Objects 13  | 1-M-PRIMARY |
| CustomObject7 CustomObject14<br>( CustomObject7 Id )   | CustomObject7                | Custom Objects 14  | 1-M-PRIMARY |
| CustomObject7 CustomObject15<br>( CustomObject7 Id )   | CustomObject7                | Custom Objects 15  | 1-M-PRIMARY |
| CustomObject7 CustomObject4<br>( CustomObject7 Id )    | CustomObject7                | Custom Objects 04  | 1-M-PRIMARY |
| CustomObject7 CustomObject5<br>( CustomObject7 Id )    | CustomObject7                | Custom Objects 05  | 1-M-PRIMARY |
| CustomObject7 CustomObject6<br>( CustomObject7 Id )    | CustomObject7                | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject7 CustomObject7<br>( CustomObject7 Id )    | CustomObject7                | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject7 CustomObject8<br>( CustomObject7 Id )    | CustomObject7                | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject7 CustomObject9<br>( CustomObject7 Id )    | CustomObject7                | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject7 DealRegistration<br>( CustomObject7 Id ) | CustomObject7                | Deal Registrations | 1-M         |
| CustomObject7 Exam<br>( CustomObject7 Id )             | CustomObject7                | Exams              | 1-M         |
| CustomObject7 FinancialAccount<br>( CustomObject7 Id ) | CustomObject7                | Financial Accounts | 1-M-PRIMARY |
| CustomObject7 Fund ( CustomObject7<br>Id )             | CustomObject7                | Funds              | 1-M         |
| CustomObject7 Fund Request<br>( CustomObject7 Id )     | CustomObject7                | Fund Requests      | 1-M         |
| CustomObject7 Household<br>( CustomObject7 Id )        | CustomObject7                | Households         | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                 | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|--|------------------------------|--------------------------|-------------|
| CustomObject7 Lead ( CustomObject7 Id )            | CustomObject7                | Leads                    | 1-M-PRIMARY |
| CustomObject7 MDFRequest ( CustomObject7 Id )      | CustomObject7                | MDF Requests             | 1-M         |
| CustomObject7 MedEdEvent ( CustomObject7 Id )      | CustomObject7                | Events                   | 1-M         |
| CustomObject7 Opportunity ( CustomObject7 Id )     | CustomObject7                | Opportunities            | 1-M-PRIMARY |
| CustomObject7 Partner ( CustomObject7 Id )         | CustomObject7                | Partners                 | 1-M         |
| CustomObject7 Policy ( CustomObject7 Id )          | CustomObject7                | Policies                 | 1-M         |
| CustomObject7 Portfolio ( CustomObject7 Id )       | CustomObject7                | Portfolios               | 1-M         |
| CustomObject7 Product ( CustomObject7 Id )         | CustomObject7                | Products                 | Child       |
| CustomObject7 Program ( CustomObject7 Id )         | CustomObject7                | Partner Programs         | 1-M         |
| CustomObject7 Revenue ( CustomObject7 Id )         | CustomObject7                | Revenues                 | Child       |
| CustomObject7 Service Request ( CustomObject7 Id ) | CustomObject7                | Service Requests         | 1-M-PRIMARY |
| CustomObject7 SmartCall ( CustomObject7 Id )       | CustomObject7                | Smart Calls              | 1-M         |
| CustomObject7 Solution ( CustomObject7 Id )        | CustomObject7                | Solutions                | 1-M         |
| CustomObject7 SPRequest ( CustomObject7 Id )       | CustomObject7                | Special Pricing Requests | 1-M         |
| CustomObject7 Vehicle ( CustomObject7 Id )         | CustomObject7                | Vehicles                 | 1-M         |
| CustomObject7/Audit Trail Item 2                   | CustomObject7                | Audit Trail              | ReadOnly    |
| CustomObject7/CustomObject7 Book                   | CustomObject7                | Books                    | Child       |
| CustomObject7/CustomObject7Team                    | CustomObject7                | Custom Object 07 Teams   | Child       |
| CustomObject8                                      | Not applicable               | Custom Objects 08        | Top         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)     | Object Type |
|--|------------------------------|------------------------|-------------|
| CustomObject8 Account<br>( CustomObject8 Id )                    | CustomObject8                | Accounts               | 1-M         |
| CustomObject8 Accreditation<br>( CustomObject8 Id )              | CustomObject8                | Accreditations         | 1-M         |
| CustomObject8 Activity<br>( CustomObject8 Id )                   | CustomObject8                | Activities             | 1-M-PRIMARY |
| CustomObject8 Asset<br>( CustomObject8 Id )                      | CustomObject8                | Assets                 | 1-M         |
| CustomObject8 Campaign<br>( CustomObject8 Id )                   | CustomObject8                | Campaigns              | 1-M         |
| CustomObject8 Certification<br>( CustomObject8 Id )              | CustomObject8                | Certifications         | 1-M         |
| CustomObject8 Channel Partner<br>( CustomObject8 Id )            | CustomObject8                | Dealers                | 1-M         |
| CustomObject8 Cmpltd Activity                                    | CustomObject8                | Activities             | 1-M-PRIMARY |
| CustomObject8 Contact<br>( CustomObject8 Id )                    | CustomObject8                | Contacts               | 1-M         |
| CustomObject8 Course<br>( CustomObject8 Id )                     | CustomObject8                | Courses                | 1-M         |
| CustomObject8<br>CRMOD_LS_Transactions<br>( CustomObject8 Id )   | CustomObject8                | Sample<br>Transactions | 1-M         |
| CustomObject8<br>CRMODLS_InventoryPeriod<br>( CustomObject8 Id ) | CustomObject8                | Inventory Periods      | 1-M         |
| CustomObject8 CRMODLS_SampleLot<br>( CustomObject8 Id )          | CustomObject8                | Sample Lots            | 1-M         |
| CustomObject8 Custom Object 1<br>( CustomObject8 Id )            | CustomObject8                | Custom Objects 01      | 1-M-PRIMARY |
| CustomObject8 Custom Object 2<br>( CustomObject8 Id )            | CustomObject8                | Custom Objects 02      | 1-M-PRIMARY |
| CustomObject8 Custom Object 3<br>( CustomObject8 Id )            | CustomObject8                | Custom Objects 03      | 1-M-PRIMARY |
| CustomObject8 CustomObject10<br>( CustomObject8 Id )             | CustomObject8                | Custom Objects 10      | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                     | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject8 CustomObject11<br>( CustomObject8 Id )   | CustomObject8                | Custom Objects 11  | 1-M-PRIMARY |
| CustomObject8 CustomObject12<br>( CustomObject8 Id )   | CustomObject8                | Custom Objects 12  | 1-M-PRIMARY |
| CustomObject8 CustomObject13<br>( CustomObject8 Id )   | CustomObject8                | Custom Objects 13  | 1-M-PRIMARY |
| CustomObject8 CustomObject14<br>( CustomObject8 Id )   | CustomObject8                | Custom Objects 14  | 1-M-PRIMARY |
| CustomObject8 CustomObject15<br>( CustomObject8 Id )   | CustomObject8                | Custom Objects 15  | 1-M-PRIMARY |
| CustomObject8 CustomObject4<br>( CustomObject8 Id )    | CustomObject8                | Custom Objects 04  | 1-M-PRIMARY |
| CustomObject8 CustomObject5<br>( CustomObject8 Id )    | CustomObject8                | Custom Objects 05  | 1-M-PRIMARY |
| CustomObject8 CustomObject6<br>( CustomObject8 Id )    | CustomObject8                | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject8 CustomObject7<br>( CustomObject8 Id )    | CustomObject8                | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject8 CustomObject8<br>( CustomObject8 Id )    | CustomObject8                | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject8 CustomObject9<br>( CustomObject8 Id )    | CustomObject8                | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject8 DealRegistration<br>( CustomObject8 Id ) | CustomObject8                | Deal Registrations | 1-M         |
| CustomObject8 Exam<br>( CustomObject8 Id )             | CustomObject8                | Exams              | 1-M         |
| CustomObject8 FinancialAccount<br>( CustomObject8 Id ) | CustomObject8                | Financial Accounts | 1-M-PRIMARY |
| CustomObject8 Fund ( CustomObject8<br>Id )             | CustomObject8                | Funds              | 1-M         |
| CustomObject8 Fund Request<br>( CustomObject8 Id )     | CustomObject8                | Fund Requests      | 1-M         |
| CustomObject8 Household<br>( CustomObject8 Id )        | CustomObject8                | Households         | 1-M         |
| CustomObject8 Lead ( CustomObject8<br>Id )             | CustomObject8                | Leads              | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                    | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| CustomObject8 MDFRequest<br>( CustomObject8 Id )      | CustomObject8                | MDF Requests             | 1-M         |
| CustomObject8 MedEdEvent<br>( CustomObject8 Id )      | CustomObject8                | Events                   | 1-M         |
| CustomObject8 Opportunity<br>( CustomObject8 Id )     | CustomObject8                | Opportunities            | 1-M-PRIMARY |
| CustomObject8 Partner<br>( CustomObject8 Id )         | CustomObject8                | Partners                 | 1-M         |
| CustomObject8 Policy<br>( CustomObject8 Id )          | CustomObject8                | Policies                 | 1-M         |
| CustomObject8 Portfolio<br>( CustomObject8 Id )       | CustomObject8                | Portfolios               | 1-M         |
| CustomObject8 Product<br>( CustomObject8 Id )         | CustomObject8                | Products                 | Child       |
| CustomObject8 Program<br>( CustomObject8 Id )         | CustomObject8                | Partner Programs         | 1-M         |
| CustomObject8 Revenue<br>( CustomObject8 Id )         | CustomObject8                | Revenues                 | Child       |
| CustomObject8 Service Request<br>( CustomObject8 Id ) | CustomObject8                | Service Requests         | 1-M-PRIMARY |
| CustomObject8 SmartCall<br>( CustomObject8 Id )       | CustomObject8                | Smart Calls              | 1-M         |
| CustomObject8 Solution<br>( CustomObject8 Id )        | CustomObject8                | Solutions                | 1-M         |
| CustomObject8 SPRequest<br>( CustomObject8 Id )       | CustomObject8                | Special Pricing Requests | 1-M         |
| CustomObject8 Vehicle<br>( CustomObject8 Id )         | CustomObject8                | Vehicles                 | 1-M         |
| CustomObject8/Audit Trail Item 2                      | CustomObject8                | Audit Trail              | ReadOnly    |
| CustomObject8/CustomObject8 Book                      | CustomObject8                | Books                    | Child       |
| CustomObject8/CustomObject8Team                       | CustomObject8                | Custom Object 08 Teams   | Child       |
| CustomObject9   | Not applicable               | Custom Objects 09        | Top         |
| CustomObject9 Account<br>( CustomObject9 Id )         | CustomObject9                | Accounts                 | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU)  | Object Type |
|--|------------------------------|---------------------|-------------|
| CustomObject9 Accreditation<br>( CustomObject9 Id )              | CustomObject9                | Accreditations      | 1-M         |
| CustomObject9 Activity<br>( CustomObject9 Id )                   | CustomObject9                | Activities          | 1-M-PRIMARY |
| CustomObject9 Asset<br>( CustomObject9 Id )                      | CustomObject9                | Assets              | 1-M         |
| CustomObject9 Campaign<br>( CustomObject9 Id )                   | CustomObject9                | Campaigns           | 1-M         |
| CustomObject9 Certification<br>( CustomObject9 Id )              | CustomObject9                | Certifications      | 1-M         |
| CustomObject9 Channel Partner<br>( CustomObject9 Id )            | CustomObject9                | Dealers             | 1-M         |
| CustomObject9 Cmpltd Activity                                    | CustomObject9                | Activities          | 1-M-PRIMARY |
| CustomObject9 Contact<br>( CustomObject9 Id )                    | CustomObject9                | Contacts            | 1-M         |
| CustomObject9 Course<br>( CustomObject9 Id )                     | CustomObject9                | Courses             | 1-M         |
| CustomObject9<br>CRMOD_LS_Transactions<br>( CustomObject9 Id )   | CustomObject9                | Sample Transactions | 1-M         |
| CustomObject9<br>CRMODLS_InventoryPeriod<br>( CustomObject9 Id ) | CustomObject9                | Inventory Periods   | 1-M         |
| CustomObject9 CRMODLS_SampleLot<br>( CustomObject9 Id )          | CustomObject9                | Sample Lots         | 1-M         |
| CustomObject9 Custom Object 1<br>( CustomObject9 Id )            | CustomObject9                | Custom Objects 01   | 1-M-PRIMARY |
| CustomObject9 Custom Object 2<br>( CustomObject9 Id )            | CustomObject9                | Custom Objects 02   | 1-M-PRIMARY |
| CustomObject9 Custom Object 3<br>( CustomObject9 Id )            | CustomObject9                | Custom Objects 03   | 1-M-PRIMARY |
| CustomObject9 CustomObject10<br>( CustomObject9 Id )             | CustomObject9                | Custom Objects 10   | 1-M-PRIMARY |
| CustomObject9 CustomObject11<br>( CustomObject9 Id )             | CustomObject9                | Custom Objects 11   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                     | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| CustomObject9 CustomObject12<br>( CustomObject9 Id )   | CustomObject9                | Custom Objects 12  | 1-M-PRIMARY |
| CustomObject9 CustomObject13<br>( CustomObject9 Id )   | CustomObject9                | Custom Objects 13  | 1-M-PRIMARY |
| CustomObject9 CustomObject14<br>( CustomObject9 Id )   | CustomObject9                | Custom Objects 14  | 1-M-PRIMARY |
| CustomObject9 CustomObject15<br>( CustomObject9 Id )   | CustomObject9                | Custom Objects 15  | 1-M-PRIMARY |
| CustomObject9 CustomObject4<br>( CustomObject9 Id )    | CustomObject9                | Custom Objects 04  | 1-M-PRIMARY |
| CustomObject9 CustomObject5<br>( CustomObject9 Id )    | CustomObject9                | Custom Objects 05  | 1-M-PRIMARY |
| CustomObject9 CustomObject6<br>( CustomObject9 Id )    | CustomObject9                | Custom Objects 06  | 1-M-PRIMARY |
| CustomObject9 CustomObject7<br>( CustomObject9 Id )    | CustomObject9                | Custom Objects 07  | 1-M-PRIMARY |
| CustomObject9 CustomObject8<br>( CustomObject9 Id )    | CustomObject9                | Custom Objects 08  | 1-M-PRIMARY |
| CustomObject9 CustomObject9<br>( CustomObject9 Id )    | CustomObject9                | Custom Objects 09  | 1-M-PRIMARY |
| CustomObject9 DealRegistration<br>( CustomObject9 Id ) | CustomObject9                | Deal Registrations | 1-M         |
| CustomObject9 Exam (<br>CustomObject9 Id )             | CustomObject9                | Exams              | 1-M         |
| CustomObject9 FinancialAccount<br>( CustomObject9 Id ) | CustomObject9                | Financial Accounts | 1-M-PRIMARY |
| CustomObject9 Fund ( CustomObject9<br>Id )             | CustomObject9                | Funds              | 1-M         |
| CustomObject9 Fund Request<br>( CustomObject9 Id )     | CustomObject9                | Fund Requests      | 1-M         |
| CustomObject9 Household<br>( CustomObject9 Id )        | CustomObject9                | Households         | 1-M         |
| CustomObject9 Lead ( CustomObject9<br>Id )             | CustomObject9                | Leads              | 1-M-PRIMARY |
| CustomObject9 MDFRequest<br>( CustomObject9 Id )       | CustomObject9                | MDF Requests       | 1-M         |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                    | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| CustomObject9 MedEdEvent<br>( CustomObject9 Id )      | CustomObject9                | Events                   | 1-M         |
| CustomObject9 Opportunity<br>( CustomObject9 Id )     | CustomObject9                | Opportunities            | 1-M-PRIMARY |
| CustomObject9 Partner<br>( CustomObject9 Id )         | CustomObject9                | Partners                 | 1-M         |
| CustomObject9 Policy<br>( CustomObject9 Id )          | CustomObject9                | Policies                 | 1-M         |
| CustomObject9 Portfolio<br>( CustomObject9 Id )       | CustomObject9                | Portfolios               | 1-M         |
| CustomObject9 Product<br>( CustomObject9 Id )         | CustomObject9                | Products                 | Child       |
| CustomObject9 Program<br>( CustomObject9 Id )         | CustomObject9                | Partner Programs         | 1-M         |
| CustomObject9 Revenue<br>( CustomObject9 Id )         | CustomObject9                | Revenues                 | Child       |
| CustomObject9 Service Request<br>( CustomObject9 Id ) | CustomObject9                | Service Requests         | 1-M-PRIMARY |
| CustomObject9 SmartCall<br>( CustomObject9 Id )       | CustomObject9                | Smart Calls              | 1-M         |
| CustomObject9 Solution<br>( CustomObject9 Id )        | CustomObject9                | Solutions                | 1-M         |
| CustomObject9 SPRequest<br>( CustomObject9 Id )       | CustomObject9                | Special Pricing Requests | 1-M         |
| CustomObject9 Vehicle<br>( CustomObject9 Id )         | CustomObject9                | Vehicles                 | 1-M         |
| CustomObject9/Audit Trail Item 2                      | CustomObject9                | Audit Trail              | ReadOnly    |
| CustomObject9/CustomObject9 Book                      | CustomObject9                | Books                    | Child       |
| CustomObject9/CustomObject9Team                       | CustomObject9                | Custom Object 09 Teams   | Child       |
| CUT Address/Audit Trail Item 2                        | SharedAddress                | Audit Trail              | ReadOnly    |
| Damage  | Not applicable               | Damages                  | Top         |
| Dealer  | Not applicable               | Dealer                   | Top         |
| Dealer Addr   | Dealer                       | Addresses                | Child       |
| Dealer Att  | Dealer                       | Attachments              | Child       |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)    | Object Type |
|---|------------------------------|-----------------------|-------------|
| Dealer Book   | Dealer                       | Books                 | Child       |
| Dealer Cmpltd Activity                                    | Dealer                       | Completed Activities  | 1-M-PRIMARY |
| Dealer Contact  | Dealer                       | Contacts              | M-M         |
| Dealer CustObj1   | Dealer                       | Custom Objects 01     | M-M-PRIMARY |
| Dealer CustObj2   | Dealer                       | Custom Objects 02     | M-M-PRIMARY |
| Dealer CustObj3   | Dealer                       | Custom Objects 03     | M-M-PRIMARY |
| Dealer Makes  | Dealer                       | Makes                 | Child       |
| Dealer Note   | Dealer                       | Notes                 | Child       |
| Dealer Open Activity                                      | Dealer                       | Open Activities       | 1-M-PRIMARY |
| Dealer Oppty  | Dealer                       | Opportunities         | 1-M-PRIMARY |
| Dealer Sales Hours  | Dealer                       | Sales Hours           | Child       |
| Dealer Service Hours                                      | Dealer                       | Service Request Hours | Child       |
| Dealer SR   | Dealer                       | Service Requests      | M-M-PRIMARY |
| Dealer Terr   | Dealer                       | Territories           | Child       |
| Dealer Vehicle  | Dealer                       | Vehicles              | 1-M         |
| DealRegistration  | Not applicable               | Deal Registrations    | Top         |
| DealRegistration Activity ( DealRegistration Id )         | DealRegistration             | Activities            | 1-M-PRIMARY |
| DealRegistration Cmpltd Activity                          | DealRegistration             | Activities            | 1-M-PRIMARY |
| DealRegistration Custom Object 1 ( Deal Registration Id ) | DealRegistration             | Custom Objects 01     | 1-M-PRIMARY |
| DealRegistration Custom Object 2 ( Deal Registration Id ) | DealRegistration             | Custom Objects 02     | 1-M-PRIMARY |
| DealRegistration Custom Object 3 ( Deal Registration Id ) | DealRegistration             | Custom Objects 03     | 1-M-PRIMARY |
| DealRegistration CustomObject10 ( Deal Registration Id )  | DealRegistration             | Custom Objects 10     | 1-M-PRIMARY |
| DealRegistration CustomObject11 ( Deal Registration Id )  | DealRegistration             | Custom Objects 11     | 1-M-PRIMARY |
| DealRegistration CustomObject12 ( Deal Registration Id )  | DealRegistration             | Custom Objects 12     | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)                    | Object Type |
|---|------------------------------|---------------------------------------|-------------|
| DealRegistration CustomObject13<br>( Deal Registration Id )             | DealRegistration             | Custom Objects 13                     | 1-M-PRIMARY |
| DealRegistration CustomObject14<br>( Deal Registration Id )             | DealRegistration             | Custom Objects 14                     | 1-M-PRIMARY |
| DealRegistration CustomObject15<br>( Deal Registration Id )             | DealRegistration             | Custom Objects 15                     | 1-M-PRIMARY |
| DealRegistration CustomObject4<br>( Deal Registration Id )              | DealRegistration             | Custom Objects 04                     | 1-M-PRIMARY |
| DealRegistration CustomObject5<br>( Deal Registration Id )              | DealRegistration             | Custom Objects 05                     | 1-M-PRIMARY |
| DealRegistration CustomObject6<br>( Deal Registration Id )              | DealRegistration             | Custom Objects 06                     | 1-M-PRIMARY |
| DealRegistration CustomObject7<br>( Deal Registration Id )              | DealRegistration             | Custom Objects 07                     | 1-M-PRIMARY |
| DealRegistration CustomObject8<br>( Deal Registration Id )              | DealRegistration             | Custom Objects 08                     | 1-M-PRIMARY |
| DealRegistration CustomObject9<br>( Deal Registration Id )              | DealRegistration             | Custom Objects 09                     | 1-M-PRIMARY |
| DealRegistration<br>DealRegistrationRevenue ( Deal<br>Registration Id ) | DealRegistration             | Deal Registration<br>Product Revenues | Child       |
| DealRegistration Lead ( Deal<br>Registration Id )                       | DealRegistration             | Leads                                 | 1-M-PRIMARY |
| DealRegistration SmartCall<br>( DealRegistration Id )                   | DealRegistration             | Smart Calls                           | 1-M         |
| DealRegistration SPRequest ( Deal<br>Registration Id )                  | DealRegistration             | Special Pricing<br>Requests           | 1-M         |
| DealRegistration/Audit Trail Item 2                                     | DealRegistration             | Audit Trail                           | ReadOnly    |
| DealRegistration/DealRegistration<br>Book                               | DealRegistration             | Books                                 | Child       |
| DealRegistration/<br>DealRegistrationTeam                               | DealRegistration             | Deal Registration<br>Teams            | Child       |
| DealRegistrationRevenue   | Not applicable               | Deal Registration<br>Product Revenues | Top         |
| Employee  | Not applicable               |                                       | Top         |
| Exam  | Not applicable               | Exams                                 | Top         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                 | Access Object Name of Parent | Display Name (ENU)                 | Object Type |
|------------------------------------|------------------------------|------------------------------------|-------------|
| Exam CertificationExam ( Exam Id ) | Exam                         | Certification Exams                | Child       |
| Exam Course ( Exam Id )            | Exam                         | Courses                            | 1-M         |
| Exam CourseExam ( Exam Id )        | Exam                         | Course Exams                       | Child       |
| Exam Custom Object 1 ( Exam Id )   | Exam                         | Custom Objects 01                  | 1-M-PRIMARY |
| Exam Custom Object 2 ( Exam Id )   | Exam                         | Custom Objects 02                  | 1-M-PRIMARY |
| Exam Custom Object 3 ( Exam Id )   | Exam                         | Custom Objects 03                  | 1-M-PRIMARY |
| Exam CustomObject10 ( Exam Id )    | Exam                         | Custom Objects 10                  | 1-M-PRIMARY |
| Exam CustomObject11 ( Exam Id )    | Exam                         | Custom Objects 11                  | 1-M-PRIMARY |
| Exam CustomObject12 ( Exam Id )    | Exam                         | Custom Objects 12                  | 1-M-PRIMARY |
| Exam CustomObject13 ( Exam Id )    | Exam                         | Custom Objects 13                  | 1-M-PRIMARY |
| Exam CustomObject14 ( Exam Id )    | Exam                         | Custom Objects 14                  | 1-M-PRIMARY |
| Exam CustomObject15 ( Exam Id )    | Exam                         | Custom Objects 15                  | 1-M-PRIMARY |
| Exam CustomObject4 ( Exam Id )     | Exam                         | Custom Objects 04                  | 1-M-PRIMARY |
| Exam CustomObject5 ( Exam Id )     | Exam                         | Custom Objects 05                  | 1-M-PRIMARY |
| Exam CustomObject6 ( Exam Id )     | Exam                         | Custom Objects 06                  | 1-M-PRIMARY |
| Exam CustomObject7 ( Exam Id )     | Exam                         | Custom Objects 07                  | 1-M-PRIMARY |
| Exam CustomObject8 ( Exam Id )     | Exam                         | Custom Objects 08                  | 1-M-PRIMARY |
| Exam CustomObject9 ( Exam Id )     | Exam                         | Custom Objects 09                  | 1-M-PRIMARY |
| Exam ExamAttachment ( Exam Id )    | Exam                         | Exam Attachments                   | Child       |
| Exam ExamCategory ( Exam Id )      | Exam                         | Exam Product<br>Product Categories | Child       |
| Exam ExamPartner ( Exam Id )       | Exam                         | Exam Partners                      | Child       |
| Exam ExamProduct ( Exam Id )       | Exam                         | Exam Products                      | Child       |
| Exam ExamRegistration ( Exam Id )  | Exam                         | Exam Registrations                 | 1-M-PRIMARY |
| Exam ExamRelationship ( Exam Id )  | Exam                         | Related Exams                      | Child       |
| Exam ExamSolution ( Exam Id )      | Exam                         | Exam Solutions                     | Child       |
| Exam/Exam Book                     | Exam                         | Books                              | Child       |
| Exam/ExamTeam                      | Exam                         | Exam Teams                         | Child       |
| ExamAttachment                     | Not applicable               | Exam Attachments                   | Top         |
| ExamCategory                       | Not applicable               | Exam Product<br>Product Categories | Top         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU) | Object Type |
|---|------------------------------|--------------------|-------------|
| ExamPartner   | Not applicable               | Exam Partners      | Top         |
| ExamProduct   | Not applicable               | Exam Products      | Top         |
| ExamRegistration  | Not applicable               | Exam Registrations | Top         |
| ExamRelationship  | Not applicable               | Related Exams      | Top         |
| ExamSolution  | Not applicable               | Exam Solutions     | Top         |
| FinancialAccount  | Not applicable               | Financial Accounts | Top         |
| FinancialAccount Activity ( Financial Account Id )        | FinancialAccount             | Activities         | 1-M-PRIMARY |
| FinancialAccount Cmpltd Activity                          | FinancialAccount             | Activities         | 1-M-PRIMARY |
| FinancialAccount Custom Object 1 ( Financial Account Id ) | FinancialAccount             | Custom Objects 01  | 1-M-PRIMARY |
| FinancialAccount Custom Object 2 ( Financial Account Id ) | FinancialAccount             | Custom Objects 02  | 1-M-PRIMARY |
| FinancialAccount Custom Object 3 ( Financial Account Id ) | FinancialAccount             | Custom Objects 03  | 1-M-PRIMARY |
| FinancialAccount CustomObject10 ( Financial Account Id )  | FinancialAccount             | Custom Objects 10  | 1-M-PRIMARY |
| FinancialAccount CustomObject11 ( Financial Account Id )  | FinancialAccount             | Custom Objects 11  | 1-M-PRIMARY |
| FinancialAccount CustomObject12 ( Financial Account Id )  | FinancialAccount             | Custom Objects 12  | 1-M-PRIMARY |
| FinancialAccount CustomObject13 ( Financial Account Id )  | FinancialAccount             | Custom Objects 13  | 1-M-PRIMARY |
| FinancialAccount CustomObject14 ( Financial Account Id )  | FinancialAccount             | Custom Objects 14  | 1-M-PRIMARY |
| FinancialAccount CustomObject15 ( Financial Account Id )  | FinancialAccount             | Custom Objects 15  | 1-M-PRIMARY |
| FinancialAccount CustomObject4 ( Financial Account Id )   | FinancialAccount             | Custom Objects 04  | 1-M-PRIMARY |
| FinancialAccount CustomObject5 ( Financial Account Id )   | FinancialAccount             | Custom Objects 05  | 1-M-PRIMARY |
| FinancialAccount CustomObject6 ( Financial Account Id )   | FinancialAccount             | Custom Objects 06  | 1-M-PRIMARY |
| FinancialAccount CustomObject7 ( Financial Account Id )   | FinancialAccount             | Custom Objects 07  | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)         | Object Type |
|---|------------------------------|----------------------------|-------------|
| FinancialAccount CustomObject8 ( Financial Account Id )           | FinancialAccount             | Custom Objects 08          | 1-M-PRIMARY |
| FinancialAccount CustomObject9 ( Financial Account Id )           | FinancialAccount             | Custom Objects 09          | 1-M-PRIMARY |
| FinancialAccount FinancialAccount ( Parent Financial Account Id ) | FinancialAccount             | Financial Accounts         | 1-M-PRIMARY |
| FinancialAccount FinancialAccountHolder ( Financial Account Id )  | FinancialAccount             | Financial Account Holders  | 1-M         |
| FinancialAccount FinancialAccountHolding ( Financial Account Id ) | FinancialAccount             | Financial Account Holdings | 1-M         |
| FinancialAccount FinancialPlan ( Financial Account Id )           | FinancialAccount             | Financial Plans            | 1-M         |
| FinancialAccount FinancialTransaction ( Financial Account Id )    | FinancialAccount             | Financial Transactions     | 1-M         |
| FinancialAccount Lead ( Financial Account Id )                    | FinancialAccount             | Leads                      | 1-M-PRIMARY |
| FinancialAccount Opportunity ( Financial Account Id )             | FinancialAccount             | Opportunities              | 1-M-PRIMARY |
| FinancialAccount Policy ( Financial Account Id )                  | FinancialAccount             | Policies                   | 1-M         |
| FinancialAccount Service Request ( Financial Account Id )         | FinancialAccount             | Service Requests           | 1-M-PRIMARY |
| FinancialAccount SmartCall ( Financial Account Id )               | FinancialAccount             | Smart Calls                | 1-M         |
| FinancialAccount/FinancialAccount Book                            | FinancialAccount             | Books                      | Child       |
| FinancialAccountHolder  | Not applicable               | Financial Account Holders  | Top         |
| FinancialAccountHolding   | Not applicable               | Financial Account Holdings | Top         |
| FinancialPlan   | Not applicable               | Financial Plans            | Top         |
| FinancialPlan Activity ( Financial Plan Id )                      | FinancialPlan                | Activities                 | 1-M-PRIMARY |
| FinancialPlan Cmpltd Activity                                     | FinancialPlan                | Activities                 | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name  | Access Object Name of Parent | Display Name (ENU)         | Object Type |
|---|------------------------------|----------------------------|-------------|
| FinancialPlan Lead ( Financial Plan Id )                                      | FinancialPlan                | Leads                      | 1-M-PRIMARY |
| FinancialPlan Opportunity ( Financial Plan Id )                               | FinancialPlan                | Opportunities              | 1-M-PRIMARY |
| FinancialPlan Service Request ( Financial Plan Id )                           | FinancialPlan                | Service Requests           | 1-M-PRIMARY |
| FinancialPlan SmartCall ( Financial Plan Id )                                 | FinancialPlan                | Smart Calls                | 1-M         |
| FinancialPlan/FinancialPlan Book  | FinancialPlan                | Books                      | Child       |
| FinancialProduct  | Not applicable               | Financial Products         | Top         |
| FinancialProduct Coverage ( Coverage Product Id )                             | FinancialProduct             | Coverages                  | 1-M         |
| FinancialProduct FinancialAccountHolding ( Financial Product Id )             | FinancialProduct             | Financial Account Holdings | 1-M         |
| FinancialProduct FinancialProduct ( Parent Financial Product Id )             | FinancialProduct             | Financial Products         | 1-M         |
| FinancialProduct FinancialTransaction ( Financial Product Id )                | FinancialProduct             | Financial Transactions     | 1-M         |
| FinancialTransaction  | Not applicable               | Financial Transactions     | Top         |
| FinancialTransaction FinancialTransaction ( Financial Transaction Parent Id ) | FinancialTransact ion        | Financial Transactions     | 1-M         |
| FinancialTransaction Service Request ( Financial Transaction Id )             | FinancialTransact ion        | Service Requests           | 1-M-PRIMARY |
| Forecast  | Not applicable               | Forecast                   | Top         |
| FR Att  | Fund Request                 | Attachments                | Child       |
| FR Audit Trail  | Fund Request                 | Audit Trail                | ReadOnly    |
| FR Cmpltd Activity  | Fund Request                 | Completed Activities       | 1-M-PRIMARY |
| FR CustObj1   | Fund Request                 | Custom Objects 01          | M-M-PRIMARY |
| FR CustObj2   | Fund Request                 | Custom Objects 02          | M-M-PRIMARY |
| FR CustObj3   | Fund Request                 | Custom Objects 03          | M-M-PRIMARY |
| FR Note   | Fund Request                 | Notes                      | Child       |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                 | Access Object Name of Parent | Display Name (ENU) | Object Type |
|------------------------------------|------------------------------|--------------------|-------------|
| FR Open Activity                   | Fund Request                 | Open Activities    | 1-M-PRIMARY |
| Fund                               | Not applicable               | Fund               | Top         |
| Fund Activity ( Fund Id )          | Fund                         | Activities         | 1-M-PRIMARY |
| Fund Att                           | Fund                         | Attachments        | Child       |
| Fund Audit Trail                   | Fund                         | Audit Trail        | ReadOnly    |
| Fund Book                          | Fund                         | Books              | Child       |
| Fund Cmpltd Activity               | Fund                         | Activities         | 1-M-PRIMARY |
| Fund Credit                        | Fund                         | Credits            | Child       |
| Fund CRMODLS_OBJECTIVE ( Fund Id ) | Fund                         | Objectives         | 1-M-PRIMARY |
| Fund CustObj1                      | Fund                         | Custom Objects 01  | M-M-PRIMARY |
| Fund CustObj2                      | Fund                         | Custom Objects 02  | M-M-PRIMARY |
| Fund CustObj3                      | Fund                         | Custom Objects 03  | M-M-PRIMARY |
| Fund CustomObject10 ( Fund Id )    | Fund                         | Custom Objects 10  | 1-M-PRIMARY |
| Fund CustomObject11 ( Fund Id )    | Fund                         | Custom Objects 11  | 1-M-PRIMARY |
| Fund CustomObject12 ( Fund Id )    | Fund                         | Custom Objects 12  | 1-M-PRIMARY |
| Fund CustomObject13 ( Fund Id )    | Fund                         | Custom Objects 13  | 1-M-PRIMARY |
| Fund CustomObject14 ( Fund Id )    | Fund                         | Custom Objects 14  | 1-M-PRIMARY |
| Fund CustomObject15 ( Fund Id )    | Fund                         | Custom Objects 15  | 1-M-PRIMARY |
| Fund CustomObject4 ( Fund Id )     | Fund                         | Custom Objects 04  | 1-M-PRIMARY |
| Fund CustomObject5 ( Fund Id )     | Fund                         | Custom Objects 05  | 1-M-PRIMARY |
| Fund CustomObject6 ( Fund Id )     | Fund                         | Custom Objects 06  | 1-M-PRIMARY |
| Fund CustomObject7 ( Fund Id )     | Fund                         | Custom Objects 07  | 1-M-PRIMARY |
| Fund CustomObject8 ( Fund Id )     | Fund                         | Custom Objects 08  | 1-M-PRIMARY |
| Fund CustomObject9 ( Fund Id )     | Fund                         | Custom Objects 09  | 1-M-PRIMARY |
| Fund Debit                         | Fund                         | Debits             | Child       |
| Fund Fund Request                  | Fund                         | Fund Requests      | 1-M         |
| Fund MDFRequest ( Fund Id )        | Fund                         | MDF Requests       | 1-M         |
| Fund MedEdEvent ( Fund Id )        | Fund                         | Events             | 1-M         |
| Fund Note                          | Fund                         | Notes              | Child       |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                              | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| Fund Participant                                | Fund                         | Participants             | M-M         |
| Fund Partner                                    | Fund                         | Partner                  | Child       |
| Fund Request                                    | Not applicable               | Fund Request             | Top         |
| Fund Request CustomObject10 ( Fund Request Id ) | Fund Request                 | Custom Objects 10        | 1-M-PRIMARY |
| Fund Request CustomObject11 ( Fund Request Id ) | Fund Request                 | Custom Objects 11        | 1-M-PRIMARY |
| Fund Request CustomObject12 ( Fund Request Id ) | Fund Request                 | Custom Objects 12        | 1-M-PRIMARY |
| Fund Request CustomObject13 ( Fund Request Id ) | Fund Request                 | Custom Objects 13        | 1-M-PRIMARY |
| Fund Request CustomObject14 ( Fund Request Id ) | Fund Request                 | Custom Objects 14        | 1-M-PRIMARY |
| Fund Request CustomObject15 ( Fund Request Id ) | Fund Request                 | Custom Objects 15        | 1-M-PRIMARY |
| Fund Request CustomObject4 ( Fund Request Id )  | Fund Request                 | Custom Objects 04        | 1-M-PRIMARY |
| Fund Request CustomObject5 ( Fund Request Id )  | Fund Request                 | Custom Objects 05        | 1-M-PRIMARY |
| Fund Request CustomObject6 ( Fund Request Id )  | Fund Request                 | Custom Objects 06        | 1-M-PRIMARY |
| Fund Request CustomObject7 ( Fund Request Id )  | Fund Request                 | Custom Objects 07        | 1-M-PRIMARY |
| Fund Request CustomObject8 ( Fund Request Id )  | Fund Request                 | Custom Objects 08        | 1-M-PRIMARY |
| Fund Request CustomObject9 ( Fund Request Id )  | Fund Request                 | Custom Objects 09        | 1-M-PRIMARY |
| Fund SmartCall ( Fund Id )                      | Fund                         | Smart Calls              | 1-M         |
| Fund SPRequest ( Fund Id )                      | Fund                         | Special Pricing Requests | 1-M         |
| HCPContactAllocation                            | Not applicable               | HCP Contact Allocations  | Top         |
| HCPContactAllocation/Audit Trail Item 2         | HCPContactAllocation         | Audit Trail              | ReadOnly    |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                 | Access Object Name of Parent | Display Name (ENU)   | Object Type |
|--|------------------------------|----------------------|-------------|
| HCPContactAllocation/<br>HCPContactAllocation Book | HCPContactAllocation         | Books                | Child       |
| Household  | Not applicable               | Household            | Top         |
| Household Att                                      | Household                    | Attachments          | ReadOnly    |
| Household Book                                     | Household                    | Books                | Child       |
| Household Claim ( Household Id )                   | Household                    | Claims               | 1-M         |
| Household Cmpltd Activity                          | Household                    | Completed Activities | 1-M-PRIMARY |
| Household Contact                                  | Household                    | Contacts             | M-M         |
| Household CustObj1                                 | Household                    | Custom Objects 01    | M-M-PRIMARY |
| Household CustObj2                                 | Household                    | Custom Objects 02    | M-M-PRIMARY |
| Household CustObj3                                 | Household                    | Custom Objects 03    | M-M-PRIMARY |
| Household CustomObject10<br>( Household Id )       | Household                    | Custom Objects 10    | 1-M-PRIMARY |
| Household CustomObject11<br>( Household Id )       | Household                    | Custom Objects 11    | 1-M-PRIMARY |
| Household CustomObject12<br>( Household Id )       | Household                    | Custom Objects 12    | 1-M-PRIMARY |
| Household CustomObject13<br>( Household Id )       | Household                    | Custom Objects 13    | 1-M-PRIMARY |
| Household CustomObject14<br>( Household Id )       | Household                    | Custom Objects 14    | 1-M-PRIMARY |
| Household CustomObject15<br>( Household Id )       | Household                    | Custom Objects 15    | 1-M-PRIMARY |
| Household CustomObject4<br>( Household Id )        | Household                    | Custom Objects 04    | 1-M-PRIMARY |
| Household CustomObject5<br>( Household Id )        | Household                    | Custom Objects 05    | 1-M-PRIMARY |
| Household CustomObject6<br>( Household Id )        | Household                    | Custom Objects 06    | 1-M-PRIMARY |
| Household CustomObject7<br>( Household Id )        | Household                    | Custom Objects 07    | 1-M-PRIMARY |
| Household CustomObject8<br>( Household Id )        | Household                    | Custom Objects 08    | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                 | Access Object Name of Parent | Display Name (ENU)        | Object Type |
|--|------------------------------|---------------------------|-------------|
| Household CustomObject9 ( Household Id )           | Household                    | Custom Objects 09         | 1-M-PRIMARY |
| Household FinancialAccount ( Household Id )        | Household                    | Financial Accounts        | 1-M-PRIMARY |
| Household FinancialAccountHolder ( Household Id )  | Household                    | Financial Account Holders | 1-M         |
| Household FinancialPlan ( Household Id )           | Household                    | Financial Plans           | 1-M         |
| Household Lead                                     | Household                    | Leads                     | ReadOnly    |
| Household Note                                     | Household                    | Notes                     | ReadOnly    |
| Household Open Activity                            | Household                    | Open Activities           | 1-M-PRIMARY |
| Household Opportunity                              | Household                    | Opportunities             | 1-M-PRIMARY |
| Household Policy ( Household Id )                  | Household                    | Policies                  | 1-M         |
| Household PolicyHolder ( Household Holder Id )     | Household                    | Policy Holders            | 1-M         |
| Household Portfolio                                | Household                    | Portfolios                | ReadOnly    |
| Household SR                                       | Household                    | Service Requests          | 1-M-PRIMARY |
| Household Team                                     | Household                    | Household Team            | Child       |
| Household/Audit Trail Item 2                       | Household                    | Audit Trail               | ReadOnly    |
| Import Export                                      | Not applicable               | Import Export             | Top         |
| InsuranceProperty                                  | Not applicable               | Insurance Properties      | Top         |
| InsuranceProperty Coverage ( Insured Property Id ) | InsuranceProperty            | Coverages                 | 1-M         |
| InsuranceProperty Damage ( Property Id )           | InsuranceProperty            | Damages                   | 1-M         |
| InvolvedParty                                      | Not applicable               | Involved Parties          | Top         |
| Lead   | Not applicable               | Lead                      | Top         |
| Lead Att   | Lead                         | Attachments               | Child       |
| Lead Book  | Lead                         | Books                     | Child       |
| Lead Cmpltd Activity                               | Lead                         | Completed Activities      | 1-M-PRIMARY |
| Lead CustObj1                                      | Lead                         | Custom Objects 01         | M-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                            | Access Object Name of Parent | Display Name (ENU) | Object Type |
|---|------------------------------|--------------------|-------------|
| Lead CustObj2                                 | Lead                         | Custom Objects 02  | M-M-PRIMARY |
| Lead CustObj3                                 | Lead                         | Custom Objects 03  | M-M-PRIMARY |
| Lead CustomObject10 ( Lead Id )               | Lead                         | Custom Objects 10  | 1-M-PRIMARY |
| Lead CustomObject11 ( Lead Id )               | Lead                         | Custom Objects 11  | 1-M-PRIMARY |
| Lead CustomObject12 ( Lead Id )               | Lead                         | Custom Objects 12  | 1-M-PRIMARY |
| Lead CustomObject13 ( Lead Id )               | Lead                         | Custom Objects 13  | 1-M-PRIMARY |
| Lead CustomObject14 ( Lead Id )               | Lead                         | Custom Objects 14  | 1-M-PRIMARY |
| Lead CustomObject15 ( Lead Id )               | Lead                         | Custom Objects 15  | 1-M-PRIMARY |
| Lead CustomObject4 ( Lead Id )                | Lead                         | Custom Objects 04  | 1-M-PRIMARY |
| Lead CustomObject5 ( Lead Id )                | Lead                         | Custom Objects 05  | 1-M-PRIMARY |
| Lead CustomObject6 ( Lead Id )                | Lead                         | Custom Objects 06  | 1-M-PRIMARY |
| Lead CustomObject7 ( Lead Id )                | Lead                         | Custom Objects 07  | 1-M-PRIMARY |
| Lead CustomObject8 ( Lead Id )                | Lead                         | Custom Objects 08  | 1-M-PRIMARY |
| Lead CustomObject9 ( Lead Id )                | Lead                         | Custom Objects 09  | 1-M-PRIMARY |
| Lead DealRegistration ( Lead Id )             | Lead                         | Deal Registrations | 1-M         |
| Lead LeadEvent ( Lead Id )                    | Lead                         | Lead Event         | Child       |
| Lead Open Activity                            | Lead                         | Open Activities    | 1-M-PRIMARY |
| Lead Partner                                  | Lead                         | Partner            | Child       |
| Lead Sales Assmt                              | Lead                         | Lead Assessment    | 1-M         |
| Lead/Audit Trail Item 2                       | Lead                         | Audit Trail        | ReadOnly    |
| Lead/LeadTeam                                 | Lead                         | Lead Teams         | Child       |
| LeadEvent                                     | Not applicable               | Lead Event         | Top         |
| MDFRequest                                    | Not applicable               | MDF Requests       | Top         |
| MDFRequest Activity ( MDFRequest Id )         | MDFRequest                   | Activities         | 1-M-PRIMARY |
| MDFRequest Cmpltd Activity                    | MDFRequest                   | Activities         | 1-M-PRIMARY |
| MDFRequest Custom Object 1 ( MDF Request Id ) | MDFRequest                   | Custom Objects 01  | 1-M-PRIMARY |
| MDFRequest Custom Object 2 ( MDF Request Id ) | MDFRequest                   | Custom Objects 02  | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                | Access Object Name of Parent | Display Name (ENU)      | Object Type |
|---|------------------------------|-------------------------|-------------|
| MDFRequest Custom Object 3 ( MDF Request Id )     | MDFRequest                   | Custom Objects 03       | 1-M-PRIMARY |
| MDFRequest CustomObject10 ( MDF Request Id )      | MDFRequest                   | Custom Objects 10       | 1-M-PRIMARY |
| MDFRequest CustomObject11 ( MDF Request Id )      | MDFRequest                   | Custom Objects 11       | 1-M-PRIMARY |
| MDFRequest CustomObject12 ( MDF Request Id )      | MDFRequest                   | Custom Objects 12       | 1-M-PRIMARY |
| MDFRequest CustomObject13 ( MDF Request Id )      | MDFRequest                   | Custom Objects 13       | 1-M-PRIMARY |
| MDFRequest CustomObject14 ( MDF Request Id )      | MDFRequest                   | Custom Objects 14       | 1-M-PRIMARY |
| MDFRequest CustomObject15 ( MDF Request Id )      | MDFRequest                   | Custom Objects 15       | 1-M-PRIMARY |
| MDFRequest CustomObject4 ( MDF Request Id )       | MDFRequest                   | Custom Objects 04       | 1-M-PRIMARY |
| MDFRequest CustomObject5 ( MDF Request Id )       | MDFRequest                   | Custom Objects 05       | 1-M-PRIMARY |
| MDFRequest CustomObject6 ( MDF Request Id )       | MDFRequest                   | Custom Objects 06       | 1-M-PRIMARY |
| MDFRequest CustomObject7 ( MDF Request Id )       | MDFRequest                   | Custom Objects 07       | 1-M-PRIMARY |
| MDFRequest CustomObject8 ( MDF Request Id )       | MDFRequest                   | Custom Objects 08       | 1-M-PRIMARY |
| MDFRequest CustomObject9 ( MDF Request Id )       | MDFRequest                   | Custom Objects 09       | 1-M-PRIMARY |
| MDFRequest MDFRequestAttachment ( MDFRequest Id ) | MDFRequest                   | MDF Request Attachments | Child       |
| MDFRequest SmartCall ( MDFRequest Id )            | MDFRequest                   | Smart Calls             | 1-M         |
| MDFRequest/Audit Trail Item 2                     | MDFRequest                   | Audit Trail             | ReadOnly    |
| MDFRequest/MDFRequest Book                        | MDFRequest                   | Books                   | Child       |
| MDFRequest/MDFRequestTeam                         | MDFRequest                   | MDF Request Teams       | Child       |
| MDFRequestAttachment                              | Not applicable               | MDF Request Attachments | Top         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                           | Access Object Name of Parent | Display Name (ENU)   | Object Type |
|--|------------------------------|----------------------|-------------|
| MedEd  | Not applicable               | Event                | Top         |
| MedEd Att                                    | MedEd                        | Attachments          | Child       |
| MedEd Cmpltd Activity                        | MedEd                        | Completed Activities | 1-M-PRIMARY |
| MedEd Contact                                | MedEd                        | Invitees             | Child       |
| MedEd CustObj1                               | MedEd                        | Custom Objects 01    | M-M-PRIMARY |
| MedEd CustObj2                               | MedEd                        | Custom Objects 02    | M-M-PRIMARY |
| MedEd CustObj3                               | MedEd                        | Custom Objects 03    | M-M-PRIMARY |
| MedEd Invitee Audit Trail                    | MedEd                        | Invitee Audit Trail  | ReadOnly    |
| MedEd Open Activity                          | MedEd                        | Open Activities      | 1-M-PRIMARY |
| MedEdEvent AccountEvent ( Event Id )         | MedEd                        | Account Event        | Child       |
| MedEdEvent Campaign ( Meded Id )             | MedEd                        | Campaigns            | 1-M         |
| MedEdEvent CRMODLS_BusinessPlan ( Meded Id ) | MedEd                        | Business Plans       | 1-M-PRIMARY |
| MedEdEvent CRMODLS_OBJECTIVE ( Meded Id )    | MedEd                        | Objectives           | 1-M-PRIMARY |
| MedEdEvent CustomObject10 ( MedEd Id )       | MedEd                        | Custom Objects 10    | 1-M-PRIMARY |
| MedEdEvent CustomObject11 ( MedEd Id )       | MedEd                        | Custom Objects 11    | 1-M-PRIMARY |
| MedEdEvent CustomObject12 ( MedEd Id )       | MedEd                        | Custom Objects 12    | 1-M-PRIMARY |
| MedEdEvent CustomObject13 ( MedEd Id )       | MedEd                        | Custom Objects 13    | 1-M-PRIMARY |
| MedEdEvent CustomObject14 ( MedEd Id )       | MedEd                        | Custom Objects 14    | 1-M-PRIMARY |
| MedEdEvent CustomObject15 ( MedEd Id )       | MedEd                        | Custom Objects 15    | 1-M-PRIMARY |
| MedEdEvent CustomObject4 ( MedEd Id )        | MedEd                        | Custom Objects 04    | 1-M-PRIMARY |
| MedEdEvent CustomObject5 ( MedEd Id )        | MedEd                        | Custom Objects 05    | 1-M-PRIMARY |
| MedEdEvent CustomObject6 ( MedEd Id )        | MedEd                        | Custom Objects 06    | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name   | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--|------------------------------|--------------------|-------------|
| MedEdEvent CustomObject7 ( MedEd Id )                          | MedEd                        | Custom Objects 07  | 1-M-PRIMARY |
| MedEdEvent CustomObject8 ( MedEd Id )                          | MedEd                        | Custom Objects 08  | 1-M-PRIMARY |
| MedEdEvent CustomObject9 ( MedEd Id )                          | MedEd                        | Custom Objects 09  | 1-M-PRIMARY |
| MedEdEvent Fund ( Meded Id )                                   | MedEd                        | Funds              | 1-M         |
| MedEdEvent LeadEvent ( Event Id )                              | MedEd                        | Lead Event         | Child       |
| MedEdEvent OpportunityEvent ( Event Id )                       | MedEd                        | Opportunity Event  | Child       |
| Objective Sales Assmt  | CRMODLS_OBJE<br>CTIVE        | Assessments        | 1-M         |
| OnDemand Custom Object 1/Audit Trail Item 2                    | CustObj1                     | Audit Trail        | ReadOnly    |
| OnDemand Custom Object 2/Audit Trail Item 2                    | CustObj2                     | Audit Trail        | ReadOnly    |
| OnDemand Custom Object 3/Audit Trail Item 2                    | CustObj3                     | Audit Trail        | ReadOnly    |
| Opportunity  | Not applicable               | Opportunity        | Top         |
| Opportunity<br>CRMODLS_PlanOpportunities<br>( Opportunity Id ) | Opportunity                  | Plan Opportunities | 1-M-PRIMARY |
| Opportunity CustomObject10<br>( Opportunity Id )               | Opportunity                  | Custom Objects 10  | 1-M-PRIMARY |
| Opportunity CustomObject11<br>( Opportunity Id )               | Opportunity                  | Custom Objects 11  | 1-M-PRIMARY |
| Opportunity CustomObject12<br>( Opportunity Id )               | Opportunity                  | Custom Objects 12  | 1-M-PRIMARY |
| Opportunity CustomObject13<br>( Opportunity Id )               | Opportunity                  | Custom Objects 13  | 1-M-PRIMARY |
| Opportunity CustomObject14<br>( Opportunity Id )               | Opportunity                  | Custom Objects 14  | 1-M-PRIMARY |
| Opportunity CustomObject15<br>( Opportunity Id )               | Opportunity                  | Custom Objects 15  | 1-M-PRIMARY |
| Opportunity CustomObject4<br>( Opportunity Id )                | Opportunity                  | Custom Objects 04  | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                 | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|--|------------------------------|--------------------------|-------------|
| Opportunity CustomObject5<br>( Opportunity Id )    | Opportunity                  | Custom Objects 05        | 1-M-PRIMARY |
| Opportunity CustomObject6<br>( Opportunity Id )    | Opportunity                  | Custom Objects 06        | 1-M-PRIMARY |
| Opportunity CustomObject7<br>( Opportunity Id )    | Opportunity                  | Custom Objects 07        | 1-M-PRIMARY |
| Opportunity CustomObject8<br>( Opportunity Id )    | Opportunity                  | Custom Objects 08        | 1-M-PRIMARY |
| Opportunity CustomObject9<br>( Opportunity Id )    | Opportunity                  | Custom Objects 09        | 1-M-PRIMARY |
| Opportunity DealRegistration<br>( Opportunity Id ) | Opportunity                  | Deal Registrations       | 1-M         |
| Opportunity Opportunity ( Parent opty Id )         | Opportunity                  | Sub- Opportunities       | 1-M-PRIMARY |
| Opportunity OpportunityEvent<br>( Opportunity Id ) | Opportunity                  | Opportunity Event        | Child       |
| Opportunity Order ( Opportunity Id )               | Opportunity                  | Orders                   | 1-M         |
| Opportunity Quote ( Opportunity Id )               | Opportunity                  | Quotes                   | 1-M         |
| Opportunity Service Request<br>( Opportunity Id )  | Opportunity                  | Service Requests         | 1-M-PRIMARY |
| Opportunity SPRequest ( Opportunity Id )           | Opportunity                  | Special Pricing Requests | 1-M         |
| OpportunityEvent                                   | Not applicable               | Opportunity Event        | Top         |
| Oppty Att  | Opportunity                  | Attachments              | Child       |
| Oppty Audit Trail                                  | Opportunity                  | Audit Trail              | ReadOnly    |
| Oppty Book   | Opportunity                  | Books                    | Child       |
| Oppty Cmpltd Activity                              | Opportunity                  | Completed Activities     | 1-M-PRIMARY |
| Oppty Competitor                                   | Opportunity                  | Opportunity Competitors  | Child       |
| Oppty Contact                                      | Opportunity                  | Contacts                 | Child       |
| Oppty CustObj1                                     | Opportunity                  | Custom Objects 01        | M-M-PRIMARY |
| Oppty CustObj2                                     | Opportunity                  | Custom Objects 02        | M-M-PRIMARY |
| Oppty CustObj3                                     | Opportunity                  | Custom Objects 03        | M-M-PRIMARY |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                          | Access Object Name of Parent | Display Name (ENU)     | Object Type |
|---|------------------------------|------------------------|-------------|
| Oppty Lead                                  | Opportunity                  | Leads                  | 1-M-PRIMARY |
| Oppty Note                                  | Opportunity                  | Notes                  | Child       |
| Oppty Open Activity                         | Opportunity                  | Open Activities        | 1-M-PRIMARY |
| Oppty Partner                               | Opportunity                  | Opportunity Partners   | Child       |
| Oppty Revenue                               | Opportunity                  | Revenues               | Child       |
| Oppty Sales Assmt                           | Opportunity                  | Opportunity Assessment | 1-M         |
| Oppty Team                                  | Opportunity                  | Opportunity Team       | Child       |
| Order                                       | Not applicable               | Orders                 | Top         |
| Order Custom Object 1 ( Order Id )          | Order                        | Custom Objects 01      | 1-M-PRIMARY |
| Order Custom Object 2 ( Order Id )          | Order                        | Custom Objects 02      | 1-M-PRIMARY |
| Order Custom Object 3 ( Order Id )          | Order                        | Custom Objects 03      | 1-M-PRIMARY |
| Order CustomObject10 ( Order Id )           | Order                        | Custom Objects 10      | 1-M-PRIMARY |
| Order CustomObject11 ( Order Id )           | Order                        | Custom Objects 11      | 1-M-PRIMARY |
| Order CustomObject12 ( Order Id )           | Order                        | Custom Objects 12      | 1-M-PRIMARY |
| Order CustomObject13 ( Order Id )           | Order                        | Custom Objects 13      | 1-M-PRIMARY |
| Order CustomObject14 ( Order Id )           | Order                        | Custom Objects 14      | 1-M-PRIMARY |
| Order CustomObject15 ( Order Id )           | Order                        | Custom Objects 15      | 1-M-PRIMARY |
| Order CustomObject4 ( Order Id )            | Order                        | Custom Objects 04      | 1-M-PRIMARY |
| Order CustomObject5 ( Order Id )            | Order                        | Custom Objects 05      | 1-M-PRIMARY |
| Order CustomObject6 ( Order Id )            | Order                        | Custom Objects 06      | 1-M-PRIMARY |
| Order CustomObject7 ( Order Id )            | Order                        | Custom Objects 07      | 1-M-PRIMARY |
| Order CustomObject8 ( Order Id )            | Order                        | Custom Objects 08      | 1-M-PRIMARY |
| Order CustomObject9 ( Order Id )            | Order                        | Custom Objects 09      | 1-M-PRIMARY |
| Order OrderItem ( Order Id )                | Order                        | Order Items            | 1-M         |
| Order/Order Book                            | Order                        | Books                  | Child       |
| Order/OrderTeam                             | Order                        | Order Teams            | Child       |
| OrderItem                                   | Not applicable               | Order Items            | Top         |
| OrderItem Custom Object 1 ( Order Item Id ) | OrderItem                    | Custom Objects 01      | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                            | Access Object Name of Parent | Display Name (ENU)     | Object Type |
|---|------------------------------|------------------------|-------------|
| OrderItem Custom Object 2 ( Order Item Id )   | OrderItem                    | Custom Objects 02      | 1-M-PRIMARY |
| OrderItem Custom Object 3 ( Order Item Id )   | OrderItem                    | Custom Objects 03      | 1-M-PRIMARY |
| OrderItem CustomObject10 ( Order Item Id )    | OrderItem                    | Custom Objects 10      | 1-M-PRIMARY |
| OrderItem CustomObject11 ( Order Item Id )    | OrderItem                    | Custom Objects 11      | 1-M-PRIMARY |
| OrderItem CustomObject12 ( Order Item Id )    | OrderItem                    | Custom Objects 12      | 1-M-PRIMARY |
| OrderItem CustomObject13 ( Order Item Id )    | OrderItem                    | Custom Objects 13      | 1-M-PRIMARY |
| OrderItem CustomObject14 ( Order Item Id )    | OrderItem                    | Custom Objects 14      | 1-M-PRIMARY |
| OrderItem CustomObject15 ( Order Item Id )    | OrderItem                    | Custom Objects 15      | 1-M-PRIMARY |
| OrderItem CustomObject4 ( Order Item Id )     | OrderItem                    | Custom Objects 04      | 1-M-PRIMARY |
| OrderItem CustomObject5 ( Order Item Id )     | OrderItem                    | Custom Objects 05      | 1-M-PRIMARY |
| OrderItem CustomObject6 ( Order Item Id )     | OrderItem                    | Custom Objects 06      | 1-M-PRIMARY |
| OrderItem CustomObject7 ( Order Item Id )     | OrderItem                    | Custom Objects 07      | 1-M-PRIMARY |
| OrderItem CustomObject8 ( Order Item Id )     | OrderItem                    | Custom Objects 08      | 1-M-PRIMARY |
| OrderItem CustomObject9 ( Order Item Id )     | OrderItem                    | Custom Objects 09      | 1-M-PRIMARY |
| Partner                                       | Not applicable               | Partner                | Top         |
| Partner Account                               | Partner                      | Account                | Child       |
| Partner AccreditationRequest ( Partner Id )   | Partner                      | Accreditation Requests | 1-M-PRIMARY |
| Partner Address                               | Partner                      | Addresses              | Child       |
| Partner Application ( Associated Partner Id ) | Partner                      | Applications           | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                    | Access Object Name of Parent | Display Name (ENU)         | Object Type |
|---|------------------------------|----------------------------|-------------|
| Partner Attachment                                    | Partner                      | Attachments                | Child       |
| Partner Book  | Partner                      | Partner Organization Books | Child       |
| Partner BrokerProfile ( Partner Name Id )             | Partner                      | Broker Profiles            | 1-M         |
| Partner Cmpltd Activity                               | Partner                      | Completed Activities       | 1-M-PRIMARY |
| Partner Contact                                       | Partner                      | Contacts                   | M-M         |
| Partner CourseEnrollment ( Offering Partner Id )      | Partner                      | Course Enrollments         | 1-M-PRIMARY |
| Partner CoursePartner ( Partner Id )                  | Partner                      | Course Partners            | Child       |
| Partner CRMODLS_BusinessPlan ( Principal Partner Id ) | Partner                      | Business Plans             | 1-M-PRIMARY |
| Partner CustObj1                                      | Partner                      | Custom Objects 01          | M-M-PRIMARY |
| Partner CustObj2                                      | Partner                      | Custom Objects 02          | M-M-PRIMARY |
| Partner CustObj3                                      | Partner                      | Custom Objects 03          | M-M-PRIMARY |
| Partner CustomObject10 ( Partner Id )                 | Partner                      | Custom Objects 10          | 1-M-PRIMARY |
| Partner CustomObject11 ( Partner Id )                 | Partner                      | Custom Objects 11          | 1-M-PRIMARY |
| Partner CustomObject12 ( Partner Id )                 | Partner                      | Custom Objects 12          | 1-M-PRIMARY |
| Partner CustomObject13 ( Partner Id )                 | Partner                      | Custom Objects 13          | 1-M-PRIMARY |
| Partner CustomObject14 ( Partner Id )                 | Partner                      | Custom Objects 14          | 1-M-PRIMARY |
| Partner CustomObject15 ( Partner Id )                 | Partner                      | Custom Objects 15          | 1-M-PRIMARY |
| Partner CustomObject4 ( Partner Id )                  | Partner                      | Custom Objects 04          | 1-M-PRIMARY |
| Partner CustomObject5 ( Partner Id )                  | Partner                      | Custom Objects 05          | 1-M-PRIMARY |
| Partner CustomObject6 ( Partner Id )                  | Partner                      | Custom Objects 06          | 1-M-PRIMARY |
| Partner CustomObject7 ( Partner Id )                  | Partner                      | Custom Objects 07          | 1-M-PRIMARY |
| Partner CustomObject8 ( Partner Id )                  | Partner                      | Custom Objects 08          | 1-M-PRIMARY |
| Partner CustomObject9 ( Partner Id )                  | Partner                      | Custom Objects 09          | 1-M-PRIMARY |
| Partner DealRegistration ( Partner Id )               | Partner                      | Deal Registrations         | 1-M         |
| Partner ExamPartner ( Partner Id )                    | Partner                      | Exam Partners              | Child       |
| Partner ExamRegistration ( Partner Id )               | Partner                      | Exam Registrations         | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                    | Access Object Name of Parent | Display Name (ENU)               | Object Type |
|---|------------------------------|----------------------------------|-------------|
| Partner Fund  | Partner                      | Fund                             | Child       |
| Partner Fund Request ( Principal Partner Account Id ) | Partner                      | Fund Requests                    | 1-M         |
| Partner Lead  | Partner                      | Lead                             | Child       |
| Partner MDFRequest ( Principal Partner Account Id )   | Partner                      | MDF Requests                     | 1-M         |
| Partner Note  | Partner                      | Notes                            | Child       |
| Partner Open Activity                                 | Partner                      | Open Activities                  | 1-M-PRIMARY |
| Partner Opportunity                                   | Partner                      | Opportunity                      | Child       |
| Partner PartnerCampaign ( Partner Id )                | Partner                      | Partner Campaigns                | Child       |
| Partner PartnerPlan ( Partner Id )                    | Partner                      | Partner Plans                    | Child       |
| Partner PartnerType ( Partner Id )                    | Partner                      | Partner Types                    | Child       |
| Partner Policy ( Carrier Id )                         | Partner                      | Policies                         | 1-M         |
| Partner Policy ( Primary Agency Id )                  | Partner                      | Policies                         | 1-M         |
| Partner Programs                                      | Partner                      | Program Membership               | Child       |
| Partner Rel   | Partner                      | Partner Relationships            | Child       |
| Partner Service Request ( Principal Partner Id )      | Partner                      | Service Requests                 | 1-M-PRIMARY |
| Partner SPPartner ( Partner Id )                      | Partner                      | Partner Special Pricing Requests | Child       |
| Partner SPRequest ( Principal Partner Account Id )    | Partner                      | Special Pricing Requests         | 1-M         |
| Partner/Audit Trail Item 2                            | Partner                      | Audit Trail                      | ReadOnly    |
| Partner/Partner Book                                  | Partner                      | Books                            | Child       |
| Partner/PartnerTeam                                   | Partner                      | Partner Teams                    | Child       |
| PartnerCampaign                                       | Not applicable               | Partner Campaigns                | Top         |
| PartnerPlan   | Not applicable               | Partner Plans                    | Top         |
| PartnerType   | Not applicable               | Partner Types                    | Top         |
| PartnerType Partner ( Primary Partner Type Id )       | PartnerType                  | Partners                         | 1-M         |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                   | Access Object Name of Parent | Display Name (ENU) | Object Type |
|--------------------------------------|------------------------------|--------------------|-------------|
| Patient                              | Not applicable               | Patient            | Top         |
| Patient Asset                        | Patient                      | Assets             | M-M         |
| Patient Contact                      | Patient                      | Relationships      | M-M         |
| Patient Note                         | Patient                      | Notes              | Child       |
| Patient Team                         | Patient                      | Patient Team       | Child       |
| Pharma ME Event/Audit Trail Item 2   | MedEd                        | Audit Trail        | ReadOnly    |
| Pharma ME Event/Pharma ME Event Book | MedEd                        | Books              | Child       |
| Pharma ME Event/Pharma ME EventTeam  | MedEd                        | Event Teams        | Child       |
| Policy                               | Not applicable               | Policies           | Top         |
| Policy Activity ( Policy Id )        | Policy                       | Activities         | 1-M-PRIMARY |
| Policy Claim ( Policy Id )           | Policy                       | Claims             | 1-M         |
| Policy Cmpltd Activity               | Policy                       | Activities         | 1-M-PRIMARY |
| Policy Coverage ( Policy Id )        | Policy                       | Coverages          | 1-M         |
| Policy Custom Object 1 ( Policy Id ) | Policy                       | Custom Objects 01  | 1-M-PRIMARY |
| Policy Custom Object 2 ( Policy Id ) | Policy                       | Custom Objects 02  | 1-M-PRIMARY |
| Policy Custom Object 3 ( Policy Id ) | Policy                       | Custom Objects 03  | 1-M-PRIMARY |
| Policy CustomObject10 ( Policy Id )  | Policy                       | Custom Objects 10  | 1-M-PRIMARY |
| Policy CustomObject11 ( Policy Id )  | Policy                       | Custom Objects 11  | 1-M-PRIMARY |
| Policy CustomObject12 ( Policy Id )  | Policy                       | Custom Objects 12  | 1-M-PRIMARY |
| Policy CustomObject13 ( Policy Id )  | Policy                       | Custom Objects 13  | 1-M-PRIMARY |
| Policy CustomObject14 ( Policy Id )  | Policy                       | Custom Objects 14  | 1-M-PRIMARY |
| Policy CustomObject15 ( Policy Id )  | Policy                       | Custom Objects 15  | 1-M-PRIMARY |
| Policy CustomObject4 ( Policy Id )   | Policy                       | Custom Objects 04  | 1-M-PRIMARY |
| Policy CustomObject5 ( Policy Id )   | Policy                       | Custom Objects 05  | 1-M-PRIMARY |
| Policy CustomObject6 ( Policy Id )   | Policy                       | Custom Objects 06  | 1-M-PRIMARY |
| Policy CustomObject7 ( Policy Id )   | Policy                       | Custom Objects 07  | 1-M-PRIMARY |
| Policy CustomObject8 ( Policy Id )   | Policy                       | Custom Objects 08  | 1-M-PRIMARY |
| Policy CustomObject9 ( Policy Id )   | Policy                       | Custom Objects 09  | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                        | Access Object Name of Parent | Display Name (ENU)   | Object Type |
|---|------------------------------|----------------------|-------------|
| Policy InsuranceProperty ( Policy Id )    | Policy                       | Insurance Properties | 1-M         |
| Policy Lead ( Policy Id )                 | Policy                       | Leads                | 1-M-PRIMARY |
| Policy Opportunity ( Policy Id )          | Policy                       | Opportunities        | 1-M-PRIMARY |
| Policy Policy ( Parent Policy Id )        | Policy                       | Policies             | 1-M         |
| Policy PolicyAttachment ( Policy Id )     | Policy                       | Policy Attachments   | Child       |
| Policy PolicyHolder ( Policy Id )         | Policy                       | Policy Holders       | 1-M         |
| Policy Service Request ( Policy Id )      | Policy                       | Service Requests     | 1-M-PRIMARY |
| Policy SmartCall ( Policy Id )            | Policy                       | Smart Calls          | 1-M         |
| Policy/Audit Trail Item 2                 | Policy                       | Audit Trail          | ReadOnly    |
| Policy/Policy Book                        | Policy                       | Books                | Child       |
| PolicyAttachment                          | Not applicable               | Policy Attachments   | Top         |
| PolicyHolder                              | Not applicable               | Policy Holders       | Top         |
| Portfolio                                 | Not applicable               | Portfolio            | Top         |
| Portfolio Book                            | Portfolio                    | Books                | Child       |
| Portfolio Cmpltd Activity                 | Portfolio                    | Completed Activities | 1-M-PRIMARY |
| Portfolio Contact                         | Portfolio                    | Contacts             | Child       |
| Portfolio CustObj1                        | Portfolio                    | Custom Objects 01    | M-M-PRIMARY |
| Portfolio CustObj2                        | Portfolio                    | Custom Objects 02    | M-M-PRIMARY |
| Portfolio CustObj3                        | Portfolio                    | Custom Objects 03    | M-M-PRIMARY |
| Portfolio CustomObject10 ( Portfolio Id ) | Portfolio                    | Custom Objects 10    | 1-M-PRIMARY |
| Portfolio CustomObject11 ( Portfolio Id ) | Portfolio                    | Custom Objects 11    | 1-M-PRIMARY |
| Portfolio CustomObject12 ( Portfolio Id ) | Portfolio                    | Custom Objects 12    | 1-M-PRIMARY |
| Portfolio CustomObject13 ( Portfolio Id ) | Portfolio                    | Custom Objects 13    | 1-M-PRIMARY |
| Portfolio CustomObject14 ( Portfolio Id ) | Portfolio                    | Custom Objects 14    | 1-M-PRIMARY |
| Portfolio CustomObject15 ( Portfolio Id ) | Portfolio                    | Custom Objects 15    | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                          | Access Object Name of Parent | Display Name (ENU)     | Object Type |
|---|------------------------------|------------------------|-------------|
| Portfolio CustomObject4 ( Portfolio Id )    | Portfolio                    | Custom Objects 04      | 1-M-PRIMARY |
| Portfolio CustomObject5 ( Portfolio Id )    | Portfolio                    | Custom Objects 05      | 1-M-PRIMARY |
| Portfolio CustomObject6 ( Portfolio Id )    | Portfolio                    | Custom Objects 06      | 1-M-PRIMARY |
| Portfolio CustomObject7 ( Portfolio Id )    | Portfolio                    | Custom Objects 07      | 1-M-PRIMARY |
| Portfolio CustomObject8 ( Portfolio Id )    | Portfolio                    | Custom Objects 08      | 1-M-PRIMARY |
| Portfolio CustomObject9 ( Portfolio Id )    | Portfolio                    | Custom Objects 09      | 1-M-PRIMARY |
| Portfolio FinancialAccount ( Portfolio Id ) | Portfolio                    | Financial Accounts     | 1-M-PRIMARY |
| Portfolio FinancialPlan ( Portfolio Id )    | Portfolio                    | Financial Plans        | 1-M         |
| Portfolio Open Activity                     | Portfolio                    | Open Activities        | 1-M-PRIMARY |
| Portfolio Sub Portfolio                     | Portfolio                    | Portfolio Sub-Accounts | 1-M         |
| Portfolio Team                              | Portfolio                    | Portfolio Team         | Child       |
| ProductIndication                           | Not applicable               | Product Indications    | Top         |
| Program                                     | Not applicable               | Partner Program        | Top         |
| Program Application ( Partner Program Id )  | Program                      | Applications           | 1-M         |
| Program Book                                | Program                      | Books                  | Child       |
| Program CustomObject10 ( Program Id )       | Program                      | Custom Objects 10      | 1-M-PRIMARY |
| Program CustomObject11 ( Program Id )       | Program                      | Custom Objects 11      | 1-M-PRIMARY |
| Program CustomObject12 ( Program Id )       | Program                      | Custom Objects 12      | 1-M-PRIMARY |
| Program CustomObject13 ( Program Id )       | Program                      | Custom Objects 13      | 1-M-PRIMARY |
| Program CustomObject14 ( Program Id )       | Program                      | Custom Objects 14      | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                              | Access Object Name of Parent | Display Name (ENU)          | Object Type |
|---|------------------------------|-----------------------------|-------------|
| Program CustomObject15 ( Program Id )           | Program                      | Custom Objects 15           | 1-M-PRIMARY |
| Program CustomObject4 ( Program Id )            | Program                      | Custom Objects 04           | 1-M-PRIMARY |
| Program CustomObject5 ( Program Id )            | Program                      | Custom Objects 05           | 1-M-PRIMARY |
| Program CustomObject6 ( Program Id )            | Program                      | Custom Objects 06           | 1-M-PRIMARY |
| Program CustomObject7 ( Program Id )            | Program                      | Custom Objects 07           | 1-M-PRIMARY |
| Program CustomObject8 ( Program Id )            | Program                      | Custom Objects 08           | 1-M-PRIMARY |
| Program CustomObject9 ( Program Id )            | Program                      | Custom Objects 09           | 1-M-PRIMARY |
| Program DealRegistration ( Partner Program Id ) | Program                      | Deal Registrations          | 1-M         |
| Program Fund Request ( Partner Program Id )     | Program                      | Fund Requests               | 1-M         |
| Program MDFRequest ( Partner Program Id )       | Program                      | MDF Requests                | 1-M         |
| Program Opportunity ( Program Id )              | Program                      | Opportunities               | 1-M-PRIMARY |
| Program ProgramAttachment ( Program Id )        | Program                      | Partner Program Attachments | Child       |
| Program SPRequest ( Partner Program Id )        | Program                      | Special Pricing Requests    | 1-M         |
| Program/Audit Trail Item 2                      | Program                      | Audit Trail                 | ReadOnly    |
| ProgramAttachment                               | Not applicable               | Partner Program Attachments | Top         |
| ProgramMember                                   | Not applicable               | Program Membership          | Top         |
| ProgramMemberAtt                                | ProgramMember                | Attachments                 | Child       |
| ProgramPartner                                  | Program                      | Program Membership          | Child       |
| Quote   | Not applicable               | Quotes                      | Top         |
| SA Value  | Sales Assmt                  | Values                      | Child       |



Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                    | Access Object Name of Parent | Display Name (ENU)       | Object Type |
|---|------------------------------|--------------------------|-------------|
| Sales Assmt   | Not applicable               | Assessment               | Top         |
| SampleRequest   | Not applicable               | Sample Requests          | Top         |
| SampleRequest SampleRequestItem ( SampleRequest Id )  | SampleRequest                | Sample Request Items     | 1-M         |
| SampleRequest/Audit Trail Item 2                      | SampleRequest                | Audit Trail              | ReadOnly    |
| SampleRequest/SampleRequest Book                      | SampleRequest                | Books                    | Child       |
| SampleRequest/SampleRequestTeam                       | SampleRequest                | Sample Request Teams     | Child       |
| SampleRequestItem                                     | Not applicable               | Sample Request Items     | Top         |
| SampleRequestItem/Audit Trail Item 2                  | SampleRequestItem            | Audit Trail              | ReadOnly    |
| SC Prod Detail  | Smart Call                   | Products Detailed        | Child       |
| SC PromItem Drop                                      | Smart Call                   | Promotional Item Dropped | Child       |
| SC Samp Drop  | Smart Call                   | Samples Dropped          | Child       |
| Service Request                                       | Not applicable               | Service Request          | Top         |
| Service Request CustomObject10 ( Service Request Id ) | Service Request              | Custom Objects 10        | 1-M-PRIMARY |
| Service Request CustomObject11 ( Service Request Id ) | Service Request              | Custom Objects 11        | 1-M-PRIMARY |
| Service Request CustomObject12 ( Service Request Id ) | Service Request              | Custom Objects 12        | 1-M-PRIMARY |
| Service Request CustomObject13 ( Service Request Id ) | Service Request              | Custom Objects 13        | 1-M-PRIMARY |
| Service Request CustomObject14 ( Service Request Id ) | Service Request              | Custom Objects 14        | 1-M-PRIMARY |
| Service Request CustomObject15 ( Service Request Id ) | Service Request              | Custom Objects 15        | 1-M-PRIMARY |
| Service Request CustomObject4 ( Service Request Id )  | Service Request              | Custom Objects 04        | 1-M-PRIMARY |
| Service Request CustomObject5 ( Service Request Id )  | Service Request              | Custom Objects 05        | 1-M-PRIMARY |
| Service Request CustomObject6 ( Service Request Id )  | Service Request              | Custom Objects 06        | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                      | Access Object Name of Parent | Display Name (ENU)    | Object Type |
|---|------------------------------|-----------------------|-------------|
| Service Request CustomObject7<br>( Service Request Id ) | Service Request              | Custom Objects 07     | 1-M-PRIMARY |
| Service Request CustomObject8<br>( Service Request Id ) | Service Request              | Custom Objects 08     | 1-M-PRIMARY |
| Service Request CustomObject9<br>( Service Request Id ) | Service Request              | Custom Objects 09     | 1-M-PRIMARY |
| Service Request/Service RequestTeam                     | Service Request              | Service Request Teams | Child       |
| SharedAddress   | Not applicable               | Address               | Top         |
| SharedAddress Account ( Address Id )                    | SharedAddress                | Accounts              | M-M         |
| SharedAddress Channel Partner<br>( Address Id )         | SharedAddress                | Dealers               | 1-M         |
| SharedAddress Contact ( Address Id )                    | SharedAddress                | Contacts              | 1-M         |
| SharedAddress Custom Object 1<br>( Address Id )         | SharedAddress                | Custom Objects 01     | 1-M-PRIMARY |
| SharedAddress Custom Object 2<br>( Address Id )         | SharedAddress                | Custom Objects 02     | 1-M-PRIMARY |
| SharedAddress Custom Object 3<br>( Address Id )         | SharedAddress                | Custom Objects 03     | 1-M-PRIMARY |
| SharedAddress CustomObject10<br>( Address Id )          | SharedAddress                | Custom Objects 10     | 1-M-PRIMARY |
| SharedAddress CustomObject11<br>( Address Id )          | SharedAddress                | Custom Objects 11     | 1-M-PRIMARY |
| SharedAddress CustomObject12<br>( Address Id )          | SharedAddress                | Custom Objects 12     | 1-M-PRIMARY |
| SharedAddress CustomObject13<br>( Address Id )          | SharedAddress                | Custom Objects 13     | 1-M-PRIMARY |
| SharedAddress CustomObject14<br>( Address Id )          | SharedAddress                | Custom Objects 14     | 1-M-PRIMARY |
| SharedAddress CustomObject15<br>( Address Id )          | SharedAddress                | Custom Objects 15     | 1-M-PRIMARY |
| SharedAddress CustomObject4<br>( Address Id )           | SharedAddress                | Custom Objects 04     | 1-M-PRIMARY |
| SharedAddress CustomObject5<br>( Address Id )           | SharedAddress                | Custom Objects 05     | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                                     | Access Object Name of Parent | Display Name (ENU)      | Object Type |
|--|------------------------------|-------------------------|-------------|
| SharedAddress CustomObject6 ( Address Id )             | SharedAddress                | Custom Objects 06       | 1-M-PRIMARY |
| SharedAddress CustomObject7 ( Address Id )             | SharedAddress                | Custom Objects 07       | 1-M-PRIMARY |
| SharedAddress CustomObject8 ( Address Id )             | SharedAddress                | Custom Objects 08       | 1-M-PRIMARY |
| SharedAddress CustomObject9 ( Address Id )             | SharedAddress                | Custom Objects 09       | 1-M-PRIMARY |
| SharedAddress Partner ( Address Id )                   | SharedAddress                | Partners                | 1-M         |
| Smart Call   | Not applicable               | Smart Call              | Top         |
| SmartCall Book   | Smart Call                   | Books                   | Child       |
| SocialMedia  | Not applicable               | Social Media            | Top         |
| SocialMedia Service Request ( Social Media Source Id ) | SocialMedia                  | Service Requests        | 1-M-PRIMARY |
| SocialProfile  | Not applicable               | Social Profiles         | Top         |
| Soln Att   | Solution                     | Attachments             | Child       |
| Soln CustObj1  | Solution                     | Custom Objects 01       | M-M-PRIMARY |
| Soln CustObj2  | Solution                     | Custom Objects 02       | M-M-PRIMARY |
| Soln CustObj3  | Solution                     | Custom Objects 03       | M-M-PRIMARY |
| Soln Product   | Solution                     | Solution Product        | 1-M         |
| Soln Related Soln                                      | Solution                     | Related Solutions       | M-M         |
| Soln SR  | Solution                     | Service Requests        | M-M-PRIMARY |
| Solution   | Not applicable               | Solution                | Top         |
| Solution AccreditationSolution ( Solution Id )         | Solution                     | Accreditation Solutions | Child       |
| Solution CertificationSolution ( Solution Id )         | Solution                     | Certification Solutions | Child       |
| Solution CourseSolution ( Solution Id )                | Solution                     | Course Solutions        | Child       |
| Solution CRMOD_LS_MessagingPlan ( Solution Id )        | Solution                     | Messaging Plans         | 1-M         |
| Solution CRMOD_LS_MsgPlanItem ( Solution Name Id )     | Solution                     | Messaging Plan Items    | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                               | Access Object Name of Parent | Display Name (ENU)               | Object Type |
|--|------------------------------|----------------------------------|-------------|
| Solution CRMOD_LS_MsgPlnRel ( Solution Name Id ) | Solution                     | Messaging Plan Item Relations    | 1-M-PRIMARY |
| Solution CustomObject10 ( Solution Id )          | Solution                     | Custom Objects 10                | 1-M-PRIMARY |
| Solution CustomObject11 ( Solution Id )          | Solution                     | Custom Objects 11                | 1-M-PRIMARY |
| Solution CustomObject12 ( Solution Id )          | Solution                     | Custom Objects 12                | 1-M-PRIMARY |
| Solution CustomObject13 ( Solution Id )          | Solution                     | Custom Objects 13                | 1-M-PRIMARY |
| Solution CustomObject14 ( Solution Id )          | Solution                     | Custom Objects 14                | 1-M-PRIMARY |
| Solution CustomObject15 ( Solution Id )          | Solution                     | Custom Objects 15                | 1-M-PRIMARY |
| Solution CustomObject4 ( Solution Id )           | Solution                     | Custom Objects 04                | 1-M-PRIMARY |
| Solution CustomObject5 ( Solution Id )           | Solution                     | Custom Objects 05                | 1-M-PRIMARY |
| Solution CustomObject6 ( Solution Id )           | Solution                     | Custom Objects 06                | 1-M-PRIMARY |
| Solution CustomObject7 ( Solution Id )           | Solution                     | Custom Objects 07                | 1-M-PRIMARY |
| Solution CustomObject8 ( Solution Id )           | Solution                     | Custom Objects 08                | 1-M-PRIMARY |
| Solution CustomObject9 ( Solution Id )           | Solution                     | Custom Objects 09                | 1-M-PRIMARY |
| Solution ExamSolution ( Solution Id )            | Solution                     | Exam Solutions                   | Child       |
| Solution/Audit Trail Item 2                      | Solution                     | Audit Trail                      | ReadOnly    |
| Solution/Solution Book                           | Solution                     | Books                            | Child       |
| SPPartner  | Not applicable               | Partner Special Pricing Requests | Top         |
| SPRequest  | Not applicable               | Special Pricing Requests         | Top         |
| SPRequest Activity ( SPRequest Id )              | SPRequest                    | Activities                       | 1-M-PRIMARY |
| SPRequest Cmpltd Activity                        | SPRequest                    | Activities                       | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                             | Access Object Name of Parent | Display Name (ENU)                  | Object Type |
|--|------------------------------|-------------------------------------|-------------|
| SPRequest Custom Object 1 ( SP Request Id )    | SPRequest                    | Custom Objects 01                   | 1-M-PRIMARY |
| SPRequest Custom Object 2 ( SP Request Id )    | SPRequest                    | Custom Objects 02                   | 1-M-PRIMARY |
| SPRequest Custom Object 3 ( SP Request Id )    | SPRequest                    | Custom Objects 03                   | 1-M-PRIMARY |
| SPRequest CustomObject10 ( SP Request Id )     | SPRequest                    | Custom Objects 10                   | 1-M-PRIMARY |
| SPRequest CustomObject11 ( SP Request Id )     | SPRequest                    | Custom Objects 11                   | 1-M-PRIMARY |
| SPRequest CustomObject12 ( SP Request Id )     | SPRequest                    | Custom Objects 12                   | 1-M-PRIMARY |
| SPRequest CustomObject13 ( SP Request Id )     | SPRequest                    | Custom Objects 13                   | 1-M-PRIMARY |
| SPRequest CustomObject14 ( SP Request Id )     | SPRequest                    | Custom Objects 14                   | 1-M-PRIMARY |
| SPRequest CustomObject15 ( SP Request Id )     | SPRequest                    | Custom Objects 15                   | 1-M-PRIMARY |
| SPRequest CustomObject4 ( SP Request Id )      | SPRequest                    | Custom Objects 04                   | 1-M-PRIMARY |
| SPRequest CustomObject5 ( SP Request Id )      | SPRequest                    | Custom Objects 05                   | 1-M-PRIMARY |
| SPRequest CustomObject6 ( SP Request Id )      | SPRequest                    | Custom Objects 06                   | 1-M-PRIMARY |
| SPRequest CustomObject7 ( SP Request Id )      | SPRequest                    | Custom Objects 07                   | 1-M-PRIMARY |
| SPRequest CustomObject8 ( SP Request Id )      | SPRequest                    | Custom Objects 08                   | 1-M-PRIMARY |
| SPRequest CustomObject9 ( SP Request Id )      | SPRequest                    | Custom Objects 09                   | 1-M-PRIMARY |
| SPRequest SmartCall ( SPRequest Id )           | SPRequest                    | Smart Calls                         | 1-M         |
| SPRequest SPPartner ( SP Request Id )          | SPRequest                    | Partner Special Pricing Requests    | Child       |
| SPRequest SPRequestAttachment ( SPRequest Id ) | SPRequest                    | Special Pricing Request Attachments | Child       |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                            | Access Object Name of Parent | Display Name (ENU)                  | Object Type |
|---|------------------------------|-------------------------------------|-------------|
| SPRequest SPRequestLineItem ( SP Request Id ) | SPRequest                    | Special Pricing Products            | Child       |
| SPRequest/Audit Trail Item 2                  | SPRequest                    | Audit Trail                         | ReadOnly    |
| SPRequest/SPRequest Book                      | SPRequest                    | Books                               | Child       |
| SPRequest/SPRequestTeam                       | SPRequest                    | Special Pricing Request Teams       | Child       |
| SPRequestAttachment                           | Not applicable               | Special Pricing Request Attachments | Top         |
| SPRequestLineItem                             | Not applicable               | Special Pricing Products            | Top         |
| SR Att  | Service Request              | Attachments                         | Child       |
| SR Audit Trail                                | Service Request              | Audit Trail                         | ReadOnly    |
| SR Book                                       | Service Request              | Books                               | Child       |
| SR Cmpltd Activity                            | Service Request              | Completed Activities                | 1-M-PRIMARY |
| SR CustObj1                                   | Service Request              | Custom Objects 01                   | M-M-PRIMARY |
| SR CustObj2                                   | Service Request              | Custom Objects 02                   | M-M-PRIMARY |
| SR CustObj3                                   | Service Request              | Custom Objects 03                   | M-M-PRIMARY |
| SR Note                                       | Service Request              | Notes                               | Child       |
| SR Open Activity                              | Service Request              | Open Activities                     | 1-M-PRIMARY |
| SR Sales Assmt                                | Service Request              | SR Assessment                       | 1-M         |
| SR Solution                                   | Service Request              | Solutions                           | M-M         |
| User  | Not applicable               |                                     | Top         |
| Vehicle                                       | Not applicable               | Vehicle                             | Top         |
| Vehicle Book                                  | Vehicle                      | Books                               | Child       |
| Vehicle Contact                               | Vehicle                      | Contacts                            | M-M         |
| Vehicle CustObj1                              | Vehicle                      | Custom Objects 01                   | M-M-PRIMARY |
| Vehicle CustObj2                              | Vehicle                      | Custom Objects 02                   | M-M-PRIMARY |
| Vehicle CustObj3                              | Vehicle                      | Custom Objects 03                   | M-M-PRIMARY |
| Vehicle CustomObject10 ( Vehicle Id )         | Vehicle                      | Custom Objects 10                   | 1-M-PRIMARY |
| Vehicle CustomObject11 ( Vehicle Id )         | Vehicle                      | Custom Objects 11                   | 1-M-PRIMARY |

Table 83. Access Object Names and Corresponding ENU Display Names

| Access Object Name                     | Access Object Name of Parent | Display Name (ENU)      | Object Type |
|--|------------------------------|-------------------------|-------------|
| Vehicle CustomObject12 ( Vehicle Id )  | Vehicle                      | Custom Objects 12       | 1-M-PRIMARY |
| Vehicle CustomObject13 ( Vehicle Id )  | Vehicle                      | Custom Objects 13       | 1-M-PRIMARY |
| Vehicle CustomObject14 ( Vehicle Id )  | Vehicle                      | Custom Objects 14       | 1-M-PRIMARY |
| Vehicle CustomObject15 ( Vehicle Id )  | Vehicle                      | Custom Objects 15       | 1-M-PRIMARY |
| Vehicle CustomObject4 ( Vehicle Id )   | Vehicle                      | Custom Objects 04       | 1-M-PRIMARY |
| Vehicle CustomObject5 ( Vehicle Id )   | Vehicle                      | Custom Objects 05       | 1-M-PRIMARY |
| Vehicle CustomObject6 ( Vehicle Id )   | Vehicle                      | Custom Objects 06       | 1-M-PRIMARY |
| Vehicle CustomObject7 ( Vehicle Id )   | Vehicle                      | Custom Objects 07       | 1-M-PRIMARY |
| Vehicle CustomObject8 ( Vehicle Id )   | Vehicle                      | Custom Objects 08       | 1-M-PRIMARY |
| Vehicle CustomObject9 ( Vehicle Id )   | Vehicle                      | Custom Objects 09       | 1-M-PRIMARY |
| Vehicle Fin Info                       | Vehicle                      | Financial Information   | Child       |
| Vehicle Sales Hist                     | Vehicle                      | Sales History           | Child       |
| Vehicle Serv Hist                      | Vehicle                      | Service Request History | Child       |
| Vehicle Service Request ( Vehicle Id ) | Vehicle                      | Service Requests        | 1-M-PRIMARY |
| VONDINS Portfolio/Audit Trail Item 2   | Portfolio                    | Audit Trail             | ReadOnly    |

## Access Levels and Corresponding Permission Codes in the XML File

This topic describes the access-profile permissions for access objects in Oracle CRM On Demand, and their corresponding permission codes in the XML file you are working with. For a given access level to an access object in Oracle CRM On Demand, use [Table 84](#) to look up the permission code that appears in the XML file and cross-reference the permission code with the access level in the Oracle CRM On Demand user interface. The permission names shown in this table are the permission names that appear in the English-American (ENU) user interface. For more information about access levels, see the access profile information in *Oracle CRM On Demand Online Help*.

Table 84. Access Levels in Oracle CRM On Demand and Corresponding Permission Codes in the XML File

| Object Type  | Permissions (ENU) | Permission Codes |
|--|-------------------|------------------|
| Top-Level Object   | Read-Only         | R                |
| Top-Level Object   | Read/Edit         | RU               |
| Top-Level Object   | Read/Edit/Delete  | RUD              |
| Related Information Object Type: Child                             | Read/Create       | CR               |
| Related Information Object Type: Child                             | Read/Create/Edit  | CRU              |
| Related Information Object Type: Child                             | Read-Only         | R                |
| Related Information Object Type: Child                             | Read/Edit         | RU               |
| Related Information Object Type: Child                             | Read/Edit/Delete  | RUD              |
| Related Information Object Type: Child                             | Full              | CRUD             |
| Related Information Object Type: Child                             | No Access         | No value         |
| Related Information Object Type: 1-M (One-to-Many)                 | Full              | CRUD             |
| Related Information Object Type: 1-M (One-to-Many)                 | Read-Only         | R                |
| Related Information Object Type: 1-M (One-to-Many)                 | No Access         | No value         |
| Related Information Object Type: 1-M-Primary (One-to-Many Primary) | Full              | CRUD             |
| Related Information Object Type: 1-M-Primary (One-to-Many Primary) | Read-Only         | R                |
| Related Information Object Type: 1-M-Primary (One-to-Many Primary) | No Access         | No value         |
| Related Information Object Type: 1-M-Primary (One-to-Many Primary) | Inherit Primary   | CRUDI            |
| Related Information Object Type: M-M (Many-to-Many)                | Read/Create       | CR               |
| Related Information Object Type: M-M (Many-to-Many)                | Read-Only         | R                |



Table 84. Access Levels in Oracle CRM On Demand and Corresponding Permission Codes in the XML File

| Object Type   | Permissions (ENU)          | Permission Codes |
|---|----------------------------|------------------|
| Related Information Object Type: M-M (Many-to-Many)                 | Full                       | CRUD             |
| Related Information Object Type: M-M (Many-to-Many)                 | No Access                  | No value         |
| Related Information Object Type: M-M-Primary (Many-to-Many Primary) | Full                       | CRUD             |
| Related Information Object Type: M-M-Primary (Many-to-Many Primary) | Read-Only                  | R                |
| Related Information Object Type: M-M-Primary (Many-to-Many Primary) | No Access                  | No value         |
| Related Information Object Type: M-M-Primary (Many-to-Many Primary) | Add/Inherit Primary        | CRUDAI           |
| Related Information Object Type: M-M-Primary (Many-to-Many Primary) | Add/Remove/Inherit Primary | CRUDAXI          |
| Related Information Object Type: M-M-Primary (Many-to-Many Primary) | Inherit Primary            | CRUDI            |
| Related Information Object Type: Read-Only                          | Read-Only                  | R                |
| Related Information Object Type: Read-Only                          | No Access                  | No value         |



# C

## Classic and Modern Theme Icons

This appendix contains the following topics:

- [Classic Theme Icons on page 387](#)
- [Modern Theme Icons on page 399](#)

### Classic Theme Icons

This topic lists the icons used for customized record types and Detail page Web applets in the corresponding XML files.

[Table 85](#) lists the classic theme icons and their file names as provided with Oracle CRM On Demand.

Table 85. Classic Theme Icons

| Icon Name | Icon  |
|-----------|---|
| 1006.gif  |  |
| 1033.gif  |  |
| 1048.gif  |  |
| 1056.gif  |  |
| 1801.gif  |  |
| 1824.gif  |  |
| 1826.gif  |  |

Table 85. Classic Theme Icons









| Icon Name                 | Icon  |
|---------------------------|---|
| 16_account.png            |    |
| 16_accountPDQPinned.png   |    |
| 16_accounts.png           |    |
| 16_account_contact.png    |    |
| 16_addresses.png          |    |
| 16_alerts_grid.png        |  |
| 16_analytics_grid.png     |  |
| 16_aroundme_grid.png      |  |
| 16_bestCallTime.png       |  |
| 16_calendar_grid.png      |  |
| 16_callHistory.png        |  |
| 16_callProductDetails.png |  |

Table 85. Classic Theme Icons

| Icon Name                  | Icon  |
|----------------------------|---|
| 16_contacts.png            |    |
| 16_contacts_grid.png       |    |
| 16_generic_grid.png        |    |
| 16_gift.png                |    |
| 16_launchDetailer.png      |    |
| 16_launchPresentation.png  |  |
| 16_leads_grid.png          |  |
| 16_licenses.png            |  |
| 16_opportunities_grid.png  |  |
| 16_presentationDetails.png |  |
| 16_relationships.png       |  |
| 16_sales_accounts_grid.png |  |

Table 85. Classic Theme Icons







| Icon Name                 | Icon  |
|---------------------------|---|
| 16_sample.png             |    |
| 16_samples.png            |    |
| 16_tasks_grid.png         |    |
| application_form.png      |    |
| application_view_tile.png |    |
| arrow_divide.png          |  |
| asterisk_orange.png       |  |
| attach.png                |  |
| award_star_gold_1.png     |  |
| bell.png                  |  |
| box.png                   |  |
| brick.png                 |  |

Table 85. Classic Theme Icons

| Icon Name               | Icon  |
|-------------------------|---|
| bug.png                 |    |
| building.png            |    |
| cake.png                |    |
| camera.png              |    |
| campaign_status.gif     |    |
| car.png                 |  |
| cart.png                |  |
| catalog_status.gif      |  |
| certificaterequired.gif |  |
| chart_bar.png           |  |
| chart_organisation.png  |  |
| chart_pie.png           |  |

Table 85. Classic Theme Icons

| Icon Name               | Icon  |
|-------------------------|---|
| clock.png               |    |
| cog.png                 |    |
| coins.png               |    |
| commentind_active.gif   |    |
| controller.png          |    |
| cup.png                 |  |
| derived_bidi_status.gif |  |
| disconnect.png          |  |
| drive_network.png       |  |
| email.png               |  |
| eye.png                 |  |
| feed_icon.gif           |  |



Table 85. Classic Theme Icons

| Icon Name         | Icon  |
|-------------------|---|
| female.png        |    |
| film.png          |    |
| flag_green.png    |    |
| heart.png         |    |
| house.png         |    |
| HR_IMAGE5_85.gif  |  |
| HR_IMAGE5_184.gif |  |
| HR_IMAGE5_221.gif |  |
| HR_IMAGE5_249.gif |  |
| HR_IMAGE5_593.gif |  |
| HR_IMAGE5_678.gif |  |
| icon_custtab.gif  |  |

Table 85. Classic Theme Icons

| Icon Name          | Icon  |
|--------------------|---|
| instore_status.gif |    |
| ipod.png           |    |
| key.png            |    |
| lightbulb.png      |    |
| lightning.png      |    |
| locked_status.gif  |  |
| male.png           |  |
| map.png            |  |
| money.png          |  |
| money_dollar.png   |  |
| money_euro.png     |  |
| mouse.png          |  |

Table 85. Classic Theme Icons




| Icon Name                 | Icon  |
|---------------------------|---|
| newupdateditem_status.gif |    |
| onvacation_status.gif     |    |
| orders_icon.gif           |    |
| package_green.png         |    |
| paintcan.png              |    |
| palette.png               |  |
| phone.png                 |  |
| photo.png                 |  |
| plugin.png                |  |
| primary_status.gif        |  |
| printer.png               |  |
| quotes_icon.gif           |  |

Table 85. Classic Theme Icons

| Icon Name             | Icon  |
|-----------------------|---|
| rainbow.png           |    |
| register_status.gif   |    |
| rosette.png           |    |
| rte_image_enabled.gif |    |
| rte_paste_enabled.gif |    |
| ruby.png              |  |
| shield.png            |  |
| sound.png             |  |
| sport_football.png    |  |
| sport_soccer.png      |  |
| telephone.png         |  |
| television.png        |  |

Table 85. Classic Theme Icons











| Icon Name                | Icon  |
|--------------------------|---|
| timeexpires_status.gif   |    |
| transmit.png             |    |
| tree_alert.gif           |    |
| tree_collateral.gif      |    |
| tree_component.gif       |    |
| tree_configextension.gif |  |
| tree_contentobject.gif   |  |
| tree_database.gif        |  |
| tree_forum.gif           |  |
| tree_grades.gif          |  |
| tree_graph.gif           |  |
| tree_library.gif         |  |

Table 85. Classic Theme Icons

| Icon Name               | Icon  |
|-------------------------|---|
| tree_messages.gif       |    |
| tree_property.gif       |    |
| tree_server.gif         |    |
| tree_servicerequest.gif |    |
| tree_sharedobjects.gif  |    |
| tree_site.gif           |  |
| tree_testobject.gif     |  |
| tree_workflow.gif       |  |
| tux.png                 |  |
| user_gray.png           |  |
| user_orange.png         |  |
| wand.png                |  |

Table 85. Classic Theme Icons

| Icon Name          | Icon  |
|--------------------|---|
| weather_sun.png    |  |
| webpage_status.gif |  |
| world.png          |  |
| zoom.png           |  |

## Modern Theme Icons

Table 86 lists the modern theme icons and their file names as provided with Oracle CRM On Demand.

Table 86. Modern Theme Icons







| Icon Name                       | Icon   |
|---------------------------------|--|
| mod_account_25.png              |  |
| mod_accountpartners_25.png      |  |
| mod_accreditation_25.png        |  |
| mod_accreditationrequest_25.png |  |
| mod_address_25.png              |  |
| mod_allocation_25.png           |  |

Table 86. Modern Theme Icons

| Icon Name                                | Icon   |
|--|--|
| mod_application_25.png                   |    |
| mod_assets_25.png                        |    |
| mod_attachment_25.png                    |    |
| mod_availableproductsfordetailing_25.png |    |
| mod_blockedproduct_25.png                |    |
| mod_books_25.png                         |  |
| mod_brokerprofile_25.png                 |  |
| mod_businessplan_25.png                  |  |
| mod_calendar_25.png                      |  |
| mod_callactivityhistory_25.png           |  |
| mod_calls_25.png                         |  |
| mod_campaign_25.png                      |  |



Table 86. Modern Theme Icons

| Icon Name                       | Icon   |
|---------------------------------|--|
| mod_category_25.png             |    |
| mod_certification_25.png        |    |
| mod_certificationrequest_25.png |    |
| mod_claim_25.png                |    |
| mod_communications_25.png       |    |
| mod_competitors_25.png          |  |
| mod_contact_25.png              |  |
| mod_contactbesttime_25.png      |  |
| mod_contactstatelicense_25.png  |  |
| mod_course_25.png               |  |
| mod_courseenrollment_25.png     |  |
| mod_coverage_25.png             |  |

Table 86. Modern Theme Icons

| Icon Name                                 | Icon   |
|---|--|
| mod_customobject_25.png                   |    |
| mod_customwebtab_25.png                   |    |
| mod_damage_25.png                         |    |
| mod_dashboard_25.png                      |    |
| mod_dealer_25.png                         |    |
| mod_dealregistration_25.png               |  |
| mod_dealregistrationproductrevenue_25.png |  |
| mod_directory_25.png                      |  |
| mod_division_25.png                       |  |
| mod_event_25.png                          |  |
| mod_exam_25.png                           |  |
| mod_exam_registration_25.png              |  |

Table 86. Modern Theme Icons

| Icon Name                          | Icon   |
|------------------------------------|--|
| mod_financialaccount_25.png        |    |
| mod_financialaccountholder_25.png  |    |
| mod_financialaccountholding_25.png |    |
| mod_financialplan_25.png           |    |
| mod_financialproduct_25.png        |    |
| mod_financialtransaction_25.png    |  |
| mod_forecast_25.png                |  |
| mod_fund_25.png                    |  |
| mod_fundcredit_25.png              |  |
| mod_funddebit_25.png               |  |
| mod_fundrequest_25.png             |  |
| mod_group_25.png                   |  |

Table 86. Modern Theme Icons

| Icon Name                       | Icon   |
|---------------------------------|--|
| mod_hash_25.png                 |    |
| mod_hcpcontactallocation_25.png |    |
| mod_home_25.png                 |    |
| mod_household_25.png            |    |
| mod_insuranceproperty_25.png    |    |
| mod_interests_25.png            |  |
| mod_inventoryauditreport_25.png |  |
| mod_inventoryperiod_25.png      |  |
| mod_involvedparty_25.png        |  |
| mod_lead_25.png                 |  |
| mod_makes_25.png                |  |
| mod_map_25.png                  |  |

Table 86. Modern Theme Icons

| Icon Name                             | Icon   |
|---------------------------------------|--|
| mod_mdrequest_25.png                  |    |
| mod_messageresponse_25.png            |    |
| mod_messagingplan_25.png              |    |
| mod_messagingplanitem_25.png          |    |
| mod_messagingplanitemrelations_25.png |    |
| mod_modificationtracking_25.png       |  |
| mod_notes_25.png                      |  |
| mod_objective_25.png                  |  |
| mod_opportunity_25.png                |  |
| mod_oraclesocialnetwork_25.png        |  |
| mod_order_25.png                      |  |
| mod_orderitem_25.png                  |  |

Table 86. Modern Theme Icons


| Icon Name                  | Icon   |
|----------------------------|--|
| mod_partnermembers_25.png  |    |
| mod_partnertype_25.png     |    |
| mod_patient_25.png         |    |
| mod_period_25.png          |    |
| mod_personalinfo_25.png    |    |
| mod_planaccount_25.png     |  |
| mod_planopportunity_25.png |  |
| mod_plans_25.png           |  |
| mod_policy_25.png          |  |
| mod_policyholder_25.png    |  |
| mod_portfolio_25.png       |  |
| mod_pricelist_25.png       |  |

Table 86. Modern Theme Icons

| Icon Name                       | Icon   |
|---------------------------------|--|
| mod_pricelistlineitem_25.png    |    |
| mod_product_25.png              |    |
| mod_productindication_25.png    |    |
| mod_products_detailed_25.png    |    |
| mod_referrals_25.png            |    |
| mod_relatedaccreditation_25.png |  |
| mod_relatedcertification_25.png |  |
| mod_relatedcourse_25.png        |  |
| mod_relatedcourses_25.png       |  |
| mod_relatedexam_25.png          |  |
| mod_relatedsolutions_25.png     |  |
| mod_relationship_25.png         |  |

Table 86. Modern Theme Icons

| Icon Name                    | Icon   |
|------------------------------|--|
| mod_reports_25.png           |    |
| mod_revenues_25.png          |    |
| mod_saleshistory_25.png      |    |
| mod_saleshours_25.png        |    |
| mod_sampledisclaimer_25.png  |    |
| mod_sampleinventory_25.png   |  |
| mod_samplelot_25.png         |  |
| mod_samplerequest_25.png     |  |
| mod_samplerequestitem_25.png |  |
| mod_samplesdropped_25.png    |  |
| mod_sampletransaction_25.png |  |
| mod_servicehistory_25.png    |  |



Table 86. Modern Theme Icons








| Icon Name                        | Icon   |
|----------------------------------|--|
| mod_servicehours_25.png          |    |
| mod_servicerequest_25.png        |    |
| mod_signature_25.png             |    |
| mod_social_25.png                |    |
| mod_socialprofile_25.png         |    |
| mod_solution_25.png              |  |
| mod_specialpricingproduct_25.png |  |
| mod_specialpricingrequest_25.png |  |
| mod_team_25.png                  |  |
| mod_territory_25.png             |  |
| mod_transactionitem_25.png       |  |
| mod_unknown_25.png               |  |

Table 86. Modern Theme Icons

| Icon Name          | Icon   |
|--------------------|--|
| mod_user_25.png    |  A blue square icon with rounded corners containing a white silhouette of a person's head and shoulders. |
| mod_vehicle_25.png |  A blue square icon with rounded corners containing a white silhouette of a car.                         |

# D

## System Names for Record Types

This appendix contains the following topic:

- [System Names for Record Types on page 411](#)

## System Names for Record Types

[Table 87](#) lists the system names for record types (objects) and their corresponding display names as they appear in the English-American (ENU) user interface in Oracle CRM On Demand.

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name           | Display Name (ENU)                     |
|------------------------------|--|
| Account                      | Account                                |
| Account Book                 | Account Book                           |
| Account Contact              | Account Contact                        |
| Account Team                 | Account Team                           |
| AccountAddress               | Account Address                        |
| AccountCall                  | Account Call                           |
| AccountCompetitor            | Account Competitor                     |
| AccountEvent                 | Account Event                          |
| AccountPartner               | Account Partner                        |
| AccountRelationship          | Account Relationship                   |
| AccountRevenue               | Account Revenue                        |
| Accreditation                | Accreditation                          |
| Accreditation Book           | Accreditation Book                     |
| AccreditationAttachment      | Accreditation Attachment               |
| AccreditationCertification   | Accreditation Certification            |
| AccreditationProduct         | Accreditation Product                  |
| AccreditationProductCategory | Accreditation Product Product Category |
| AccreditationRelationship    | Related Accreditation                  |
| AccreditationRequest         | Accreditation Request                  |
| AccreditationSolution        | Accreditation Solution                 |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name     | Display Name (ENU)                 |
|------------------------|------------------------------------|
| AccreditationTeam      | Accreditation Team                 |
| Activity               | Activity                           |
| Activity Book          | Book                               |
| Address                | Address Location                   |
| AdminDelegatedFromUser | Delegated From Users               |
| AllotmentUsageData     | Allotment Usage                    |
| Application            | Application                        |
| Application Book       | Application Book                   |
| ApplicationAttachment  | Application Attachment             |
| ApplicationObject      | Application Object                 |
| ApplicationTeam        | Application Team                   |
| Appointment            | Appointment                        |
| Asset                  | Asset                              |
| Attendee Call          | Attendee Call                      |
| Audit Trail            | Audit Trail                        |
| Auto Vehicle Book      | Vehicle Book                       |
| AutomateTask           | Activity                           |
| BlockedProduct         | Blocked Product                    |
| Book                   | Book                               |
| Book User              | Book Users                         |
| BrokerProfile          | Broker Profile                     |
| CalendarActivityTheme  | Calendar Activities                |
| Call MessagePlanVBC    | Available Message Plan             |
| Call ProdDetail        | Call Product Detail                |
| Call ProdDetailVBC     | Available Product Detailed         |
| Call PromItemDrop      | Call Promotional Items Dropped     |
| Call PromItemDropVBC   | Available Promotional Item Dropped |
| Call SampDrop          | Call Sample Dropped                |
| Call SampDropVBC       | Available Sample Dropped           |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name           | Display Name (ENU)   |
|------------------------------|--|
| CallActivityHistory          | Call Activity History<br><br><b>NOTE:</b> Field management configurations for the Call Activity History record type can be updated through the user interface only. You can use the Oracle Migration Tool On Demand client to read field management configurations for this record type, but you cannot use the Oracle Migration Tool On Demand client to update field management configurations for this record type. |
| CallProdDetail_MsgPlanItem   | Call Product Detail Messaging Plan Item  |
| CallProdDetail_MsgPlnRel     | Call Product Detail Messaging Plan Item Relations  |
| CallProdDetail_MsgRsp        | Call Product Detail Message Response   |
| Campaign                     | Campaign   |
| Campaign Book                | Campaign Book  |
| Category                     | Product Category   |
| Certification                | Certification  |
| Certification Book           | Certification Book   |
| CertificationAttachment      | Certification Attachment   |
| CertificationCourse          | Certification Course   |
| CertificationExam            | Certification Exam   |
| CertificationProduct         | Certification Product  |
| CertificationProductCategory | Certification Product Product Category   |
| CertificationRelationship    | Related Certification  |
| CertificationRequest         | Certification Request  |
| CertificationSolution        | Certification Solution   |
| CertificationTeam            | Certification Team   |
| Channel Partner              | Dealer   |
| Channel Partner Territory    | Dealer Territory   |
| Claim                        | Claim  |
| ClientSideExt                | Client Side Extension  |
| CODActChatDetail             | Communications Chat  |
| CODActEmailDetail            | Communications Email   |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name        | Display Name (ENU)              |
|---------------------------|---------------------------------|
| CODActVMDetail            | Communications Voicemail        |
| CODActVoiceDetail         | Communications Call             |
| CODWrapUp                 | Communications Wrap Up          |
| Company                   | Company                         |
| Contact                   | Contact                         |
| Contact Book              | Contact Book                    |
| Contact Call              | Contact Call                    |
| Contact Team              | Contact Team                    |
| ContactAddress            | Contact Address                 |
| ContactBestTimes          | Contact Best Time               |
| ContactCampaign           | Campaign Recipients             |
| ContactInterest           | Contact Interests               |
| ContactRelationship       | Contact Relationship            |
| ContactRevenue            | Contact Revenue                 |
| Course                    | Course                          |
| Course Book               | Course Book                     |
| CourseAttachment          | Course Attachment               |
| CourseCategory            | Course Product Product Category |
| CourseEnrollment          | Course Enrollment               |
| CourseExam                | Course Exam                     |
| CoursePartner             | Course Partner                  |
| CourseProduct             | Course Product                  |
| CourseRelationship        | Related Course                  |
| CourseSolution            | Course Solution                 |
| CourseTeam                | Course Team                     |
| Coverage                  | Coverage                        |
| CRMDesktopLocInstaller    | Localization                    |
| CRMDesktopMetadataPackage | Package                         |
| CRMOD_LS_Allocation       | Allocation                      |
| CRMOD_LS_Allocation Book  | Allocation Book                 |
| CRMOD_LS_ContactLicenses  | Contact State License           |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name                | Display Name (ENU)            |
|-----------------------------------|-------------------------------|
| CRMOD_LS_MessagingPlan            | Messaging Plan                |
| CRMOD_LS_MessagingPlan Book       | Messaging Plan Book           |
| CRMOD_LS_MsgPlanItem              | Messaging Plan Item           |
| CRMOD_LS_MsgPlnRel                | Messaging Plan Item Relations |
| CRMOD_LS_Period                   | Period                        |
| CRMOD_LS_TransactionItems         | Transaction Item              |
| CRMOD_LS_Transactions             | Sample Transaction            |
| CRMOD_LS_Transactions Book        | Sample Transaction Book       |
| CRMODLS_BPL_ACNT                  | Plan Account                  |
| CRMODLS_BPL_CNTCT                 | Plan Contact                  |
| CRMODLS_BusinessPlan              | Business Plan                 |
| CRMODLS_BusinessPlan Book         | Business Plan Book            |
| CRMODLS_BusinessPlan_ATTACHMENT   | Business Plan Attachment      |
| CRMODLS_BusinessPlanTeam          | Business Plan Team            |
| CRMODLS_InventoryAuditReport      | Inventory Audit Report        |
| CRMODLS_InventoryAuditReport Book | Inventory Audit Report Book   |
| CRMODLS_InventoryPeriod           | Inventory Period              |
| CRMODLS_InventoryPeriod Book      | Inventory Period Book         |
| CRMODLS_ModificationLog           | Modification Tracking         |
| CRMODLS_OBJECTIVE                 | Objective                     |
| CRMODLS_OBJECTIVE Book            | Objective Book                |
| CRMODLS_OBJECTIVE_ATTACHMENT      | Objective Attachment          |
| CRMODLS_OBJECTIVETeam             | Objective Team                |
| CRMODLS_PCD_MSGRSP                | Message Response              |
| CRMODLS_PlanOpportunities         | Plan Opportunity              |
| CRMODLS_RELDISC                   | Related Disclaimer            |
| CRMODLS_SampleInventory           | Sample Inventory              |
| CRMODLS_SampleLot                 | Sample Lot                    |
| CRMODLS_SampleLot Book            | Sample Lot Book               |
| CRMODLS_Signature                 | Signature                     |
| CRMODLS_SIGNDISC                  | Sample Disclaimer             |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name   | Display Name (ENU)    |
|----------------------|-----------------------|
| CustObj1 Team        | Custom Object 01 Team |
| CustObj2 Team        | Custom Object 02 Team |
| CustObj3 Team        | Custom Object 03 Team |
| Custom Object 1      | Custom Object 01      |
| Custom Object 1 Book | Custom Object 01 Book |
| Custom Object 2      | Custom Object 02      |
| Custom Object 2 Book | Custom Object 02 Book |
| Custom Object 3      | Custom Object 03      |
| Custom Object 3 Book | Custom Object 03 Book |
| CustomIcons          | Icon                  |
| CustomObject10       | Custom Object 10      |
| CustomObject10 Book  | Custom Object 10 Book |
| CustomObject10Team   | Custom Object 10 Team |
| CustomObject11       | Custom Object 11      |
| CustomObject11 Book  | Custom Object 11 Book |
| CustomObject11Team   | Custom Object 11 Team |
| CustomObject12       | Custom Object 12      |
| CustomObject12 Book  | Custom Object 12 Book |
| CustomObject12Team   | Custom Object 12 Team |
| CustomObject13       | Custom Object 13      |
| CustomObject13 Book  | Custom Object 13 Book |
| CustomObject13Team   | Custom Object 13 Team |
| CustomObject14       | Custom Object 14      |
| CustomObject14 Book  | Custom Object 14 Book |
| CustomObject14Team   | Custom Object 14 Team |
| CustomObject15       | Custom Object 15      |
| CustomObject15 Book  | Custom Object 15 Book |
| CustomObject15Team   | Custom Object 15 Team |
| CustomObject16       | Custom Object 16      |
| CustomObject16Team   | Custom Object 16 Team |
| CustomObject17       | Custom Object 17      |



Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| <b>Object System Name</b> | <b>Display Name (ENU)</b> |
|---------------------------|---------------------------|
| CustomObject17Team        | Custom Object 17 Team     |
| CustomObject18            | Custom Object 18          |
| CustomObject18Team        | Custom Object 18 Team     |
| CustomObject19            | Custom Object 19          |
| CustomObject19Team        | Custom Object 19 Team     |
| CustomObject20            | Custom Object 20          |
| CustomObject20Team        | Custom Object 20 Team     |
| CustomObject21            | Custom Object 21          |
| CustomObject21Team        | Custom Object 21 Team     |
| CustomObject22            | Custom Object 22          |
| CustomObject22Team        | Custom Object 22 Team     |
| CustomObject23            | Custom Object 23          |
| CustomObject23Team        | Custom Object 23 Team     |
| CustomObject24            | Custom Object 24          |
| CustomObject24Team        | Custom Object 24 Team     |
| CustomObject25            | Custom Object 25          |
| CustomObject25Team        | Custom Object 25 Team     |
| CustomObject26            | Custom Object 26          |
| CustomObject26Team        | Custom Object 26 Team     |
| CustomObject27            | Custom Object 27          |
| CustomObject27Team        | Custom Object 27 Team     |
| CustomObject28            | Custom Object 28          |
| CustomObject28Team        | Custom Object 29 Team     |
| CustomObject29            | Custom Object 29          |
| CustomObject29Team        | Custom Object 29 Team     |
| CustomObject30            | Custom Object 30          |
| CustomObject30Team        | Custom Object 30 Team     |
| CustomObject31            | Custom Object 31          |
| CustomObject31Team        | Custom Object 31 Team     |
| CustomObject32            | Custom Object 32          |
| CustomObject32Team        | Custom Object 32 Team     |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name | Display Name (ENU)    |
|--------------------|-----------------------|
| CustomObject33     | Custom Object 33      |
| CustomObject33Team | Custom Object 33 Team |
| CustomObject34     | Custom Object 34      |
| CustomObject34Team | Custom Object 34 Team |
| CustomObject35     | Custom Object 35      |
| CustomObject35Team | Custom Object 35 Team |
| CustomObject36     | Custom Object 36      |
| CustomObject36Team | Custom Object 36 Team |
| CustomObject37     | Custom Object 37      |
| CustomObject37Team | Custom Object 37 Team |
| CustomObject38     | Custom Object 38      |
| CustomObject38Team | Custom Object 38 Team |
| CustomObject39     | Custom Object 39      |
| CustomObject39Team | Custom Object 39 Team |
| CustomObject4      | Custom Object 04      |
| CustomObject4 Book | Custom Object 04 Book |
| CustomObject40     | Custom Object 40      |
| CustomObject40Team | Custom Object 40 Team |
| CustomObject4Team  | Custom Object 04 Team |
| CustomObject5      | Custom Object 05      |
| CustomObject5 Book | Custom Object 05 Book |
| CustomObject5Team  | Custom Object 05 Team |
| CustomObject6      | Custom Object 06      |
| CustomObject6 Book | Custom Object 06 Book |
| CustomObject6Team  | Custom Object 06 Team |
| CustomObject7      | Custom Object 07      |
| CustomObject7 Book | Custom Object 07 Book |
| CustomObject7Team  | Custom Object 07 Team |
| CustomObject8      | Custom Object 08      |
| CustomObject8 Book | Custom Object 08 Book |
| CustomObject8Team  | Custom Object 08 Team |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name      | Display Name (ENU)                |
|-------------------------|-----------------------------------|
| CustomObject9           | Custom Object 09                  |
| CustomObject9 Book      | Custom Object 09 Book             |
| CustomObject9Team       | Custom Object 09 Team             |
| Damage                  | Damage                            |
| Dashboard               | Dashboard                         |
| Dealer Book             | Book                              |
| DealerAddress           | Dealer Address                    |
| DealRegistration        | Deal Registration                 |
| DealRegistration Book   | Deal Registration Book            |
| DealRegistrationRevenue | Deal Registration Product Revenue |
| DealRegistrationTeam    | Deal Registration Team            |
| Delegated User          | Delegated To Users                |
| DelegatedFrom User      | Delegated From Users              |
| Division                | Division                          |
| Exam                    | Exam                              |
| Exam Book               | Exam Book                         |
| ExamAttachment          | Exam Attachment                   |
| ExamCategory            | Exam Product Product Category     |
| ExamPartner             | Exam Partner                      |
| ExamProduct             | Exam Product                      |
| ExamRegistration        | Exam Registration                 |
| ExamRelationship        | Related Exam                      |
| ExamSolution            | Exam Solution                     |
| ExamTeam                | Exam Team                         |
| FinancialAccount        | Financial Account                 |
| FinancialAccount Book   | Financial Account Book            |
| FinancialAccountHolder  | Financial Account Holder          |
| FinancialAccountHolding | Financial Account Holding         |
| FinancialPlan           | Financial Plan                    |
| FinancialPlan Book      | Financial Plan Book               |
| FinancialProduct        | Financial Product                 |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name        | Display Name (ENU)          |
|---------------------------|-----------------------------|
| FinancialTransaction      | Financial Transaction       |
| Forecast                  | Forecast                    |
| Fund                      | Fund                        |
| Fund Book                 | Fund Book                   |
| Fund Item                 | Fund Item                   |
| Fund Request              | Fund Request                |
| FundPartner               | Fund Membership             |
| GlobalHeaderCustomIcons   | Global Header Icon          |
| GlobalHeaderMenu          | Global Header Icon          |
| Group                     | Group                       |
| HCPContactAllocation      | HCP Contact Allocation      |
| HCPContactAllocation Book | HCP Contact Allocation Book |
| Household                 | Household                   |
| Household Book            | Book                        |
| Household Contact         | Household Contact           |
| HouseholdTeam             | Household Team              |
| InsuranceProperty         | Insurance Property          |
| InvolvedParty             | Involved Party              |
| Lead                      | Lead                        |
| Lead Book                 | Lead Book                   |
| LeadEvent                 | Lead Event                  |
| LeadPartner               | Lead Partner                |
| LeadTeam                  | Lead Team                   |
| MDFRequest                | MDF Request                 |
| MDFRequest Book           | MDF Request Book            |
| MDFRequestAttachment      | MDF Request Attachment      |
| MDFRequestTeam            | MDF Request Team            |
| MedEdEvent                | Event                       |
| MedEdInvitee              | Invitee                     |
| Note                      | Note                        |
| ObjectIconSet             | Icon Set                    |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name       | Display Name (ENU)          |
|--------------------------|-----------------------------|
| Opportunity              | Opportunity                 |
| Opportunity Book         | Opportunity Book            |
| Opportunity Contact Role | Opportunity Contact Role    |
| Opportunity Team         | Opportunity Team            |
| OpportunityCompetitor    | Opportunity Competitor      |
| OpportunityEvent         | Opportunity Event           |
| OpportunityPartner       | Opportunity Partner         |
| OpportunityRevenue       | Opportunity Product Revenue |
| OracleSocialNetwork      | Social                      |
| Order                    | Order                       |
| Order Book               | Order Book                  |
| OrderItem                | Order Item                  |
| OrderTeam                | Order Team                  |
| Partner                  | Partner                     |
| Partner Book             | Partner Book                |
| PartnerAccount           | Partner Account             |
| PartnerAddress           | Partner Address             |
| PartnerCampaign          | Partner Campaign            |
| PartnerOpportunity       | Partner Opportunity         |
| PartnerPlan              | Partner Plan                |
| PartnerProgram           | Program Membership          |
| PartnerRelationship      | Partner Relationship        |
| PartnerRole              | Partner User Role           |
| PartnerTeam              | Partner Team                |
| PartnerType              | Partner Type                |
| Patient                  | Patient                     |
| PatientAsset             | Patient Asset               |
| PatientContact           | Patient Contact             |
| PatientTeam              | Patient Team                |
| Pharma ME Event Book     | Event Book                  |
| Pharma ME EventTeam      | Event Team                  |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name        | Display Name (ENU)         |
|---------------------------|----------------------------|
| PickValueGroup            | Picklist Value Group       |
| Policy                    | Policy                     |
| Policy Book               | Policy Book                |
| PolicyAttachment          | Policy Attachment          |
| PolicyHolder              | Policy Holder              |
| Portfolio                 | Portfolio                  |
| PortfolioContact          | Portfolio Owner            |
| PortfolioOwners           | Contact Portfolio          |
| PortfolioTeam             | Portfolio Team             |
| PriceList                 | Price List                 |
| PriceListLineItem         | Price List Line Item       |
| PRMDelegatedAdmin         | User Partner Admin         |
| Process                   | Process                    |
| ProcessFieldSetup         | Field Setup                |
| ProcessPrimaryValue       | Primary Value              |
| ProcessRelatedAccess      | Related Access Control     |
| ProcessStep               | Transition State           |
| Product                   | Product                    |
| ProductIndication         | Product Indication         |
| Program                   | Partner Program            |
| Program Book              | Program Book               |
| ProgramAttachment         | Partner Program Attachment |
| ProgramPartner            | Program Membership         |
| Quote                     | Quote                      |
| RecordUtilization         | Record Utilization         |
| Revenue                   | Revenue                    |
| Sales Assessment          | Assessment                 |
| Sales Assessment Template | Assessment                 |
| SampleRequest             | Sample Request             |
| SampleRequest Book        | Sample Request Book        |
| SampleRequestItem         | Sample Request Item        |

Table 87. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

| Object System Name  | Display Name (ENU)                 |
|---------------------|------------------------------------|
| SampleRequestTeam   | Sample Request Team                |
| Service Request     | Service Request                    |
| Service RequestTeam | Service Request Team               |
| ServiceQuota        | Service Allotment                  |
| SharedAddress       | Address                            |
| SmartCall           | Smart Call                         |
| SocialMedia         | Social Media                       |
| SocialProfile       | Social Profile                     |
| Solution            | Solution                           |
| Solution Book       | Solution Book                      |
| SPPartner           | Partner Special Pricing Request    |
| SPRequest           | Special Pricing Request            |
| SPRequest Book      | Special Pricing Request Book       |
| SPRequestAttachment | Special Pricing Request Attachment |
| SPRequestLineItem   | Special Pricing Product            |
| SPRequestTeam       | Special Pricing Request Team       |
| Task                | Task                               |
| Territory           | Territory                          |
| Theme               | Theme                              |
| User                | User                               |
| UserAdmin           | User Admin                         |
| UserDivision        | User Division                      |
| UserOwner           | User Owner                         |
| Vehicle             | Vehicle                            |
| Vehicle FinInfo     | Vehicle Financial Information      |
| Vehicle SalesHist   | Vehicle Sales History              |
| Vehicle ServHist    | Vehicle Service History            |





# E

## Homepage Section Layout Mapping

This appendix contains the following topic:

- [Homepage Section Layout Mapping on page 425](#)

### Homepage Section Layout Mapping

Table 88 shows the names of the Homepage section layouts in the Homepage XML files and their corresponding display names in the user interface for various Oracle CRM On Demand objects. The display names shown in this table are the display names that appear in the English-American (ENU) user interface of Oracle CRM On Demand.

**NOTE:** The Oracle Migration Tool On Demand client does not support Homepage layout migration for the following record types: Forecast, Daily Calendar, Reports, and Dashboard.

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name   | Homepage Section Layout Name        | Display Name (ENU)                 |
|---------------|-------------------------------------|------------------------------------|
| Account       | Account Analysis Report             | Account Analysis                   |
| Account       | AccountsRecentlyViewedList          | My Recently Viewed Accounts        |
| Account       | All Recently Created Accounts       | Recently Created Accounts          |
| Account       | All Recently Modified Accounts      | Recently Modified Accounts         |
| Account       | AllOpenAccountTasks                 | Account Tasks                      |
| Account       | HomepageAccountList                 | Account Lists                      |
| Account       | MyCurrentAccountTasks               | My Current Account Related Tasks   |
| Account       | MyOpenAccountTasks                  | My Open Account Related Tasks      |
| Account       | MyRecentlyCreatedAccounts           | My Recently Created Accounts       |
| Account       | MyRecentlyModifiedAccounts          | My Recently Modified Accounts      |
| Accreditation | Accreditation.AllList               | Accreditation Lists                |
| Accreditation | Accreditation.AllRecentlyCreated    | Recently Created Accreditations    |
| Accreditation | Accreditation.AllRecentlyIntroduced | Recently Introduced Accreditations |
| Accreditation | Accreditation.AllRecentlyModified   | Recently Modified Accreditations   |
| Accreditation | Accreditation.AllRetiring           | Retiring Accreditations            |
| Accreditation | Accreditation.MyList                | My Accreditations                  |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name    | Homepage Section Layout Name             | Display Name (ENU)                  |
|----------------|--|-------------------------------------|
| Accreditation  | Accreditation.MyRecentlyCreated          | My Recently Created Accreditations  |
| Accreditation  | Accreditation.MyRecentlyModified         | My Recently Modified Accreditations |
| Accreditation  | Accreditation.MyRecentlyViewedListLayout | My Recently Viewed Accreditations   |
| Application    | Application.AllApplication               | All Applications                    |
| Application    | Application.AllApproved                  | All Approved Applications           |
| Application    | Application.AllList                      | Application Lists                   |
| Application    | Application.AllRejected                  | All Rejected Applications           |
| Application    | Application.AllSubmitted                 | All Submitted Applications          |
| Application    | Application.MyApplication                | My Applications                     |
| Application    | Application.MyRecentlyCreated            | My Recently Created Applications    |
| Application    | Application.MyRecentlyModified           | My Recently Modified Applications   |
| Asset          | Asset.AllList                            | Asset Lists                         |
| Asset          | Asset.AllRecentlyModified                | Recently Modified Assets            |
| BlockedProduct | BlockedProduct.AllList                   | Blocked Product Lists               |
| BlockedProduct | BlockedProduct.AllRecentlyModified       | Recently Modified Blocked Products  |
| BrokerProfile  | BrokerProfile.AllList                    | Broker Profile Lists                |
| BrokerProfile  | BrokerProfile.AllNatBrokers              | All National Broker Profiles        |
| BrokerProfile  | BrokerProfile.AllRecentlyModified        | Recently Modified Broker Profiles   |
| BrokerProfile  | BrokerProfile.MyBrokerProfiles           | My Broker Profiles                  |
| Campaign       | Active Campaign Status Report            | Active Campaign Status              |
| Campaign       | All Recently Created Campaigns           | Recently Created Campaigns          |
| Campaign       | All Recently Modified Campaigns          | Recently Modified Campaigns         |
| Campaign       | AllOpenCampaignTasks                     | Campaign Tasks                      |
| Campaign       | CampaignList                             | Campaign Lists                      |
| Campaign       | CampaignRecentlyViewedList               | My Recently Viewed Campaigns        |
| Campaign       | Homepage Active Campaigns                | Active Campaigns                    |
| Campaign       | MyCurrentCampaignTasks                   | My Current Campaign Related Tasks   |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name     | Homepage Section Layout Name             | Display Name (ENU)                  |
|-----------------|--|-------------------------------------|
| Campaign        | MyOpenCampaignTasks                      | My Open Campaign Related Tasks      |
| Campaign        | MyRecentlyCreatedCampaigns               | My Recently Created Campaigns       |
| Campaign        | MyRecentlyModifiedCampaigns              | My Recently Modified Campaigns      |
| Certification   | Certification.AllList                    | Certification Lists                 |
| Certification   | Certification.AllRecentlyCreated         | Recently Created Certifications     |
| Certification   | Certification.AllRecentlyIntroduced      | Recently Introduced Certifications  |
| Certification   | Certification.AllRecentlyModified        | Recently Modified Certifications    |
| Certification   | Certification.AllRetiring                | Retiring Certifications             |
| Certification   | Certification.MyList                     | My Certifications                   |
| Certification   | Certification.MyRecentlyCreated          | My Recently Created Certifications  |
| Certification   | Certification.MyRecentlyModified         | My Recently Modified Certifications |
| Certification   | Certification.MyRecentlyViewedListLayout | My Recently Viewed Certifications   |
| Channel Partner | All Recently Created Dealers             | Recently Created Dealers            |
| Channel Partner | All Recently Modified Dealers            | Recently Modified Dealers           |
| Channel Partner | DealerList                               | Dealer Lists                        |
| Channel Partner | DealersRecentlyViewedList                | My Recently Viewed Dealers          |
| Channel Partner | My Recently Created Dealers              | My Recently Created Dealers         |
| Channel Partner | My Recently Modified Dealers             | My Recently Modified Dealers        |
| Channel Partner | OpptyList                                | Dealer-Related Opportunities        |
| Claim           | Claim.AllList                            | Claim Lists                         |
| Claim           | Claim.AllRecentlyModified                | Recently Modified Claims            |
| Contact         | All Recently Created Contacts            | Recently Created Contacts           |
| Contact         | All Recently Modified Contacts           | Recently Modified Contacts          |
| Contact         | AllOpenContactTasks                      | Contact Tasks                       |
| Contact         | Contact Analysis By Account Report       | Contact Analysis By Account         |
| Contact         | ContactsRecentlyViewedList               | My Recently Viewed Contacts         |
| Contact         | FavoriteContactsList                     | Favorite Contacts                   |
| Contact         | HomepageContactList                      | Contact Lists                       |
| Contact         | MyCurrentContactTasks                    | My Current Contact Related Tasks    |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name              | Homepage Section Layout Name                 | Display Name (ENU)                              |
|--------------------------|--|---|
| Contact                  | MyOpenContactTasks                           | My Open Contact Related Tasks                   |
| Contact                  | MyRecentlyCreatedContacts                    | My Recently Created Contacts                    |
| Contact                  | MyRecentlyModifiedContacts                   | My Recently Modified Contacts                   |
| Course                   | Course.AllList                               | Course Lists                                    |
| Course                   | Course.AllRecentlyCreated                    | Recently Created Courses                        |
| Course                   | Course.AllRecentlyIntroduced                 | Recently Introduced Courses                     |
| Course                   | Course.AllRecentlyModified                   | Recently Modified Courses                       |
| Course                   | Course.AllRetiring                           | Retiring Courses                                |
| Course                   | Course.MyList                                | My Courses                                      |
| Course                   | Course.MyRecentlyCreated                     | My Recently Created Courses                     |
| Course                   | Course.MyRecentlyModified                    | My Recently Modified Courses                    |
| Course                   | Course.MyRecentlyViewedListLayout            | My Recently Viewed Courses                      |
| Coverage                 | Coverage.AllList                             | Coverage Lists                                  |
| Coverage                 | Coverage.AllRecentlyModified                 | Recently Modified Coverages                     |
| CRMOD_LS_Allocation      | CRMOD_LS_Allocation.AllList                  | Allocation Lists                                |
| CRMOD_LS_Allocation      | CRMOD_LS_Allocation.AllRecentlyModified      | Recently Modified Allocations                   |
| CRMOD_LS_ContactLicenses | CRMOD_LS_ContactLicenses.AllList             | Contact State License Lists                     |
| CRMOD_LS_ContactLicenses | CRMOD_LS_ContactLicenses.AllRecentlyModified | Recently Modified Contact State Licenses        |
| CRMOD_LS_MessagingPlan   | CRMOD_LS_MessagingPlan.AllList               | Messaging Plan Lists                            |
| CRMOD_LS_MessagingPlan   | CRMOD_LS_MessagingPlan.AllRecentlyModified   | Recently Modified Messaging Plans               |
| CRMOD_LS_MsgPlanItem     | CRMOD_LS_MsgPlanItem.AllList                 | Messaging Plan Item Lists                       |
| CRMOD_LS_MsgPlanItem     | CRMOD_LS_MsgPlanItem.AllRecentlyModified     | Recently Modified Messaging Plan Items          |
| CRMOD_LS_MsgPlanRel      | CRMOD_LS_MsgPlanRel.AllList                  | Messaging Plan Item Relations Lists             |
| CRMOD_LS_MsgPlanRel      | CRMOD_LS_MsgPlanRel.AllRecentlyModified      | Recently Modified Messaging Plan Item Relations |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name                  | Homepage Section Layout Name                     | Display Name (ENU)                        |
|------------------------------|--|---|
| CRMOD_LS_Transactions        | CRMOD_LS_Transactions.AllList                    | Sample Transaction Lists                  |
| CRMOD_LS_Transactions        | CRMOD_LS_Transactions.AllRecentlyModified        | Recently Modified Sample Transactions     |
| CRMODLS_BPL_ACNT             | CRMODLS_BPL_ACNT.AllList                         | Plan Account Lists                        |
| CRMODLS_BPL_ACNT             | CRMODLS_BPL_ACNT.AllRecentlyModified             | Recently Modified Plan Accounts           |
| CRMODLS_BPL_CNTCT            | CRMODLS_BPL_CNTCT.AllList                        | Plan Contact Lists                        |
| CRMODLS_BPL_CNTCT            | CRMODLS_BPL_CNTCT.AllRecentlyModified            | Recently Modified Plan Contacts           |
| CRMODLS_BusinessPlan         | CRMODLS_BusinessPlan.AllList                     | Business Plan Lists                       |
| CRMODLS_BusinessPlan         | CRMODLS_BusinessPlan.AllRecentlyModified         | Recently Modified Business Plans          |
| CRMODLS_InventoryAuditReport | CRMODLS_InventoryAuditReport.AllList             | Inventory Audit Report Lists              |
| CRMODLS_InventoryAuditReport | CRMODLS_InventoryAuditReport.AllRecentlyModified | Recently Modified Inventory Audit Reports |
| CRMODLS_InventoryPeriod      | CRMODLS_InventoryPeriod.AllList                  | Inventory Period Lists                    |
| CRMODLS_InventoryPeriod      | CRMODLS_InventoryPeriod.AllRecentlyModified      | Recently Modified Inventory Periods       |
| CRMODLS_OBJECTIVE            | CRMODLS_OBJECTIVE.AllList                        | Objective Lists                           |
| CRMODLS_OBJECTIVE            | CRMODLS_OBJECTIVE.AllRecentlyModified            | Recently Modified Objectives              |
| CRMODLS_PlanOpportunities    | CRMODLS_PlanOpportunities.AllList                | Plan Opportunity Lists                    |
| CRMODLS_PlanOpportunities    | CRMODLS_PlanOpportunities.AllRecentlyModified    | Recently Modified Plan Opportunities      |
| CRMODLS_SampleLot            | CRMODLS_SampleLot.AllList                        | Sample Lot Lists                          |
| CRMODLS_SampleLot            | CRMODLS_SampleLot.AllRecentlyModified            | Recently Modified Sample Lots             |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name      | Homepage Section Layout Name         | Display Name (ENU)                     |
|------------------|--------------------------------------|--|
| CRMODLS_SIGNDISC | CRMODLS_SIGNDISC.AllList             | Sample Disclaimer Lists                |
| CRMODLS_SIGNDISC | CRMODLS_SIGNDISC.AllRecentlyModified | Recently Modified Sample Disclaimers   |
| Custom Object 1  | All Recently Created CustObjs1       | Recently Created Custom Objects 01     |
| Custom Object 1  | All Recently Modified CustObjs1      | Recently Modified Custom Objects 01    |
| Custom Object 1  | CO1RecentlyViewedList                | My Recently Viewed Custom Objects 01   |
| Custom Object 1  | CustObj1List                         | Custom Object 01 Lists                 |
| Custom Object 1  | My Recently Created CustObjs1        | My Recently Created Custom Objects 01  |
| Custom Object 1  | My Recently Modified CustObjs1       | My Recently Modified Custom Objects 01 |
| Custom Object 2  | All Recently Created CustObjs2       | Recently Created Custom Objects 02     |
| Custom Object 2  | All Recently Modified CustObjs2      | Recently Modified Custom Objects 02    |
| Custom Object 2  | CO2RecentlyViewedList                | My Recently Viewed Custom Objects 02   |
| Custom Object 2  | CustObj2List                         | Custom Object 02 Lists                 |
| Custom Object 2  | My Recently Created CustObjs2        | My Recently Created Custom Objects 02  |
| Custom Object 2  | My Recently Modified CustObjs2       | My Recently Modified Custom Objects 02 |
| Custom Object 3  | All Recently Created CustObjs3       | Recently Created Custom Objects 03     |
| Custom Object 3  | All Recently Modified CustObjs3      | Recently Modified Custom Objects 03    |
| Custom Object 3  | CO3RecentlyViewedList                | My Recently Viewed Custom Objects 03   |
| Custom Object 3  | CustObj3List                         | Custom Object 03 Lists                 |
| Custom Object 3  | My Recently Created CustObjs3        | My Recently Created Custom Objects 03  |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name     | Homepage Section Layout Name       | Display Name (ENU)                     |
|-----------------|------------------------------------|--|
| Custom Object 3 | My Recently Modified CustObjs3     | My Recently Modified Custom Objects 03 |
| CustomObject10  | CustomObject10.AllList             | Custom Object 10 Lists                 |
| CustomObject10  | CustomObject10.AllRecentlyModified | Recently Modified Custom Objects 10    |
| CustomObject11  | CustomObject11.AllList             | Custom Object 11 Lists                 |
| CustomObject11  | CustomObject11.AllRecentlyModified | Recently Modified Custom Objects 11    |
| CustomObject12  | CustomObject12.AllList             | Custom Object 12 Lists                 |
| CustomObject12  | CustomObject12.AllRecentlyModified | Recently Modified Custom Objects 12    |
| CustomObject13  | CustomObject13.AllList             | Custom Object 13 Lists                 |
| CustomObject13  | CustomObject13.AllRecentlyModified | Recently Modified Custom Objects 13    |
| CustomObject14  | CustomObject14.AllList             | Custom Object 14 Lists                 |
| CustomObject14  | CustomObject14.AllRecentlyModified | Recently Modified Custom Objects 14    |
| CustomObject15  | CustomObject15.AllList             | Custom Object 15 Lists                 |
| CustomObject15  | CustomObject15.AllRecentlyModified | Recently Modified Custom Objects 15    |
| CustomObject4   | CustomObject4.AllList              | Custom Object 04 Lists                 |
| CustomObject4   | CustomObject4.AllRecentlyModified  | Recently Modified Custom Objects 04    |
| CustomObject5   | CustomObject5.AllList              | Custom Object 05 Lists                 |
| CustomObject5   | CustomObject5.AllRecentlyModified  | Recently Modified Custom Objects 05    |
| CustomObject6   | CustomObject6.AllList              | Custom Object 06 Lists                 |
| CustomObject6   | CustomObject6.AllRecentlyModified  | Recently Modified Custom Objects 06    |
| CustomObject7   | CustomObject7.AllList              | Custom Object 07 Lists                 |
| CustomObject7   | CustomObject7.AllRecentlyModified  | Recently Modified Custom Objects 07    |
| CustomObject8   | CustomObject8.AllList              | Custom Object 08 Lists                 |
| CustomObject8   | CustomObject8.AllRecentlyModified  | Recently Modified Custom Objects 08    |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name            | Homepage Section Layout Name               | Display Name (ENU)                                      |
|------------------------|--|---|
| CustomObject9          | CustomObject9.AllList                      | Custom Object 09 Lists                                  |
| CustomObject9          | CustomObject9.AllRecentlyModified          | Recently Modified Custom Objects 09                     |
| Damage                 | Damage.AllList                             | Damage Lists  |
| Damage                 | Damage.AllRecentlyModified                 | Recently Modified Damages                               |
| DealRegistration       | DealRegistration.AllList                   | Deal Registration Lists                                 |
| DealRegistration       | DealRegistration.AllRecentlyModified       | Recently Modified Deal Registrations                    |
| DealRegistration       | DealRegistration.ApprovedDRPDQLayout       | Active Deal Registrations                               |
| DealRegistration       | DealRegistration.DRExpiryPDQLayout         | Deal Registrations Expiring in the Next 30 Days         |
| DealRegistration       | DealRegistration.DRNoActivityPDQLayout     | Deal Registrations with no Activity in the Past 30 Days |
| DealRegistration       | DealRegistration.MyApprovalPDQLayout       | Deal Registrations Waiting for My Approval              |
| DealRegistration       | DealRegistration.RecentlyCreatedPDQLayout  | Recently Created Deal Registrations                     |
| Exam                   | Exam.AllList                               | Exam Lists  |
| Exam                   | Exam.AllRecentlyCreated                    | Recently Created Exams                                  |
| Exam                   | Exam.AllRecentlyIntroduced                 | Recently Introduced Exams                               |
| Exam                   | Exam.AllRecentlyModified                   | Recently Modified Exams                                 |
| Exam                   | Exam.AllRetiring                           | Retiring Exams  |
| Exam                   | Exam.MyList                                | My Exams  |
| Exam                   | Exam.MyRecentlyCreated                     | My Recently Created Exams                               |
| Exam                   | Exam.MyRecentlyModified                    | My Recently Modified Exams                              |
| Exam                   | Exam.MyRecentlyViewedListLayout            | My Recently Viewed Exams                                |
| FinancialAccount       | FinancialAccount.AllList                   | Financial Account Lists                                 |
| FinancialAccount       | FinancialAccount.AllRecentlyModified       | Recently Modified Financial Accounts                    |
| FinancialAccountHolder | FinancialAccountHolder.AllList             | Financial Account Holder Lists                          |
| FinancialAccountHolder | FinancialAccountHolder.AllRecentlyModified | Recently Modified Financial Account Holders             |



Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name             | Homepage Section Layout Name                | Display Name (ENU)                           |
|-------------------------|---|--|
| FinancialAccountHolding | FinancialAccountHolding.AllList             | Financial Account Holding Lists              |
| FinancialAccountHolding | FinancialAccountHolding.AllRecentlyModified | Recently Modified Financial Account Holdings |
| FinancialPlan           | FinancialPlan.AllList                       | Financial Plan Lists                         |
| FinancialPlan           | FinancialPlan.AllRecentlyModified           | Recently Modified Financial Plans            |
| FinancialProduct        | FinancialProduct.AllList                    | Financial Product Lists                      |
| FinancialProduct        | FinancialProduct.AllRecentlyModified        | Recently Modified Financial Products         |
| FinancialTransaction    | FinancialTransaction.AllList                | Financial Transaction Lists                  |
| FinancialTransaction    | FinancialTransaction.AllRecentlyModified    | Recently Modified Financial Transactions     |
| Fund                    | All Pending Fund Requests                   | Pending Fund Requests                        |
| Fund                    | FundList                                    | Fund Lists                                   |
| Fund                    | FundRequestList                             | All Fund Requests                            |
| Fund                    | FundRequestOpenActivities                   | Fund Request - Open Activities               |
| Fund                    | My Pending Fund Requests                    | My Pending Fund Requests                     |
| HCPContactAllocation    | HCPContactAllocation.AllList                | HCP Contact Allocation Lists                 |
| HCPContactAllocation    | HCPContactAllocation.AllRecentlyModified    | Recently Modified HCP Contact Allocations    |
| Homepage                | Account Analysis Report                     | Account Analysis                             |
| Homepage                | AccountsRecentlyViewedList                  | My Recently Viewed Accounts                  |
| Homepage                | Active Campaign Status Report               | Active Campaign Status                       |
| Homepage                | Alert                                       | Alerts                                       |
| Homepage                | ApptList                                    | Appointments                                 |
| Homepage                | CampaignsRecentlyViewedList                 | My Recently Viewed Campaigns                 |
| Homepage                | Contact Analysis By Account Report          | Contact Analysis By Account                  |
| Homepage                | ContactsRecentlyViewedList                  | My Recently Viewed Contacts                  |
| Homepage                | FavoriteContactsList                        | Favorite Contacts                            |
| Homepage                | Homepage Task                               | Open Tasks                                   |
| Homepage                | Lead Followup Analysis Report               | Lead Followup Analysis                       |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name       | Homepage Section Layout Name          | Display Name (ENU)                     |
|-------------------|---------------------------------------|--|
| Homepage          | LeadsRecentlyViewedList               | My Recently Viewed Leads               |
| Homepage          | MyRecentlyCreatedLeads                | My Recently Created Leads              |
| Homepage          | MyRecentlyModifiedAccounts            | My Recently Modified Accounts          |
| Homepage          | MyRecentlyModifiedCampaigns           | My Recently Modified Campaigns         |
| Homepage          | MyRecentlyModifiedContacts            | My Recently Modified Contacts          |
| Homepage          | MyRecentlyModifiedOpportunities       | My Recently Modified Opportunities     |
| Homepage          | MyRecentlyModifiedSolutions           | My Recently Modified Solutions         |
| Homepage          | New Account                           | Recently Modified Accounts             |
| Homepage          | New Campaign                          | Recently Modified Campaigns            |
| Homepage          | New Contact                           | Recently Modified Contacts             |
| Homepage          | New Lead                              | Recently Modified Leads                |
| Homepage          | New Opportunity                       | Recently Modified Opportunities        |
| Homepage          | New Service Request                   | My Open Service Requests               |
| Homepage          | New Solution                          | Recently Created Solutions             |
| Homepage          | Open Service Request Analysis Report  | Open Service Request Analysis          |
| Homepage          | OpptyRecentlyViewedList               | My Recently Viewed Opportunities       |
| Homepage          | Pipeline Analysis Report              | Pipeline Analysis For Current Quarter  |
| Homepage          | Pipeline Quality Report               | Pipeline Quality For Current Quarter   |
| Homepage          | SolutionsRecentlyViewedList           | My Recently Viewed Solutions           |
| Homepage          | TaskList Home                         | My Open Tasks                          |
| Household         | All Recently Created Households       | Recently Created Households            |
| Household         | All Recently Modified Households      | Recently Modified Households           |
| Household         | HouseholdList                         | Household Lists                        |
| Household         | HouseholdsRecentlyViewedList          | My Recently Viewed Households          |
| Household         | My Recently Created Households        | My Recently Created Households         |
| Household         | My Recently Modified Households       | My Recently Modified Households        |
| InsuranceProperty | InsuranceProperty.AllList             | Insurance Property Lists               |
| InsuranceProperty | InsuranceProperty.AllRecentlyModified | Recently Modified Insurance Properties |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name   | Homepage Section Layout Name       | Display Name (ENU)                 |
|---------------|------------------------------------|------------------------------------|
| InvolvedParty | InvolvedParty.AllList              | Involved Party Lists               |
| InvolvedParty | InvolvedParty.AllRecentlyModified  | Recently Modified Involved Parties |
| Lead          | All Recently Created Leads         | Recently Created Leads             |
| Lead          | All Recently Modified Leads        | Recently Modified Leads            |
| Lead          | AllOpenLeadTasks                   | Lead Tasks                         |
| Lead          | HomepageLeadsList                  | Lead Lists                         |
| Lead          | Homepage My Recent Assigned Leads  | My Recently Assigned Leads         |
| Lead          | Lead Followup Analysis Report      | Lead Followup Analysis             |
| Lead          | LeadList                           | Qualified Leads                    |
| Lead          | LeadsRecentlyViewedList            | My Recently Viewed Leads           |
| Lead          | MyCurrentLeadTasks                 | My Current Lead Related Tasks      |
| Lead          | MyOpenLeadTasks                    | My Open Lead Related Tasks         |
| Lead          | MyRecentlyCreatedLeads             | My Recently Created Leads          |
| Lead          | MyRecentlyModifiedLeads            | My Recently Modified Leads         |
| MDFRequest    | MDFRequest.AllList                 | All MDF Requests                   |
| MDFRequest    | MDFRequest.AllPending              | All Pending MDF Requests           |
| MDFRequest    | MDFRequest.AllRecentlyCreated      | Recently Created MDF Requests      |
| MDFRequest    | MDFRequest.AllRecentlyModified     | Recently Modified MDF Requests     |
| MDFRequest    | MDFRequest.MyApproved              | My Approved MDF Requests           |
| MDFRequest    | MDFRequest.MyList                  | My MDF Requests                    |
| MDFRequest    | MDFRequest.MyPending               | My Pending MDF Requests            |
| MDFRequest    | MDFRequest.MyRecentlyCreated       | My Recently Created MDF Requests   |
| MDFRequest    | MDFRequest.MyRecentlyModified      | My Recently Modified MDF Requests  |
| MDFRequest    | MDFRequest.PendingMyApproval       | MDF Requests Pending My Approval   |
| MedEdEvent    | All Recently Created MedEd Events  | Recently Created Events            |
| MedEdEvent    | All Recently Modified MedEd Events | Recently Modified Events           |
| MedEdEvent    | Homepage Task MedEd                | Event-Related Tasks                |
| MedEdEvent    | MedEdList                          | Event Lists                        |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name         | Homepage Section Layout Name            | Display Name (ENU)                    |
|---------------------|---|---------------------------------------|
| MedEdEvent          | MedEdsRecentlyViewedList                | My Recently Viewed Events             |
| MedEdEvent          | My Recently Created MedEd Events        | My Recently Created Events            |
| MedEdEvent          | My Recently Modified MedEd Events       | My Recently Modified Events           |
| Opportunity         | All Recently Created Opportunities      | Recently Created Opportunities        |
| Opportunity         | All Recently Modified Opportunities     | Recently Modified Opportunities       |
| Opportunity         | AllOpenOpptyTasks                       | Opportunity Tasks                     |
| Opportunity         | HomepageOpptyList                       | Opportunity Lists                     |
| Opportunity         | MyCurrentOpptyTasks                     | My Current Opportunity Related Tasks  |
| Opportunity         | MyOpenOpptyTasks                        | My Open Opportunity Related Tasks     |
| Opportunity         | MyRecentlyCreatedOpportunities          | My Recently Created Opportunities     |
| Opportunity         | MyRecentlyModifiedOpportunities         | My Recently Modified Opportunities    |
| Opportunity         | OpptyRecentlyViewedList                 | My Recently Viewed Opportunities      |
| Opportunity         | Pipeline Analysis Report                | Pipeline Analysis For Current Quarter |
| OracleSocialNetwork | OracleSocialNetwork.AllList             | Social Lists                          |
| OracleSocialNetwork | OracleSocialNetwork.AllRecentlyModified | Recently Modified Social              |
| Order               | Order.AllList                           | Order Lists                           |
| Order               | Order.AllRecentlyCreated                | All Recently Created Orders           |
| Order               | Order.MyRecentlyCreated                 | My Recently Created Orders            |
| Order               | Order.RecentlyViewed                    | My Recently Viewed Orders             |
| Partner             | All Recently Created Partners           | Recently Created Partners             |
| Partner             | All Recently Modified Partners          | Recently Modified Partners            |
| Partner             | HomepagePartnerList                     | Partner Lists                         |
| Partner             | MyRecentlyCreatedPartners               | My Recently Created Partners          |
| Partner             | MyRecentlyModifiedPartners              | My Recently Modified Partners         |
| Partner             | PartnersRecentlyViewedList              | My Recently Viewed Partners           |
| Patient             | All Recently Created Patients           | Recently Created Patients             |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name       | Homepage Section Layout Name           | Display Name (ENU)                    |
|-------------------|--|---------------------------------------|
| Patient           | All Recently Modified Patients         | Recently Modified Patients            |
| Patient           | My Recently Created Patients           | My Recently Created Patients          |
| Patient           | My Recently Modified Patients          | My Recently Modified Patients         |
| Patient           | PatientList                            | Patient Lists                         |
| Patient           | PatientsRecentlyViewedList             | My Recently Viewed Patients           |
| Policy            | Policy.AllList                         | Policy Lists                          |
| Policy            | Policy.AllRecentlyModified             | Recently Modified Policies            |
| Policy            | Policy.MyPoliciesList                  | My Policies                           |
| PolicyHolder      | PolicyHolder.AllList                   | Policy Holder Lists                   |
| PolicyHolder      | PolicyHolder.AllRecentlyModified       | Recently Modified Policy Holders      |
| Portfolio         | All Recently Created Portfolios        | Recently Created Portfolios           |
| Portfolio         | All Recently Modified Portfolios       | Recently Modified Portfolios          |
| Portfolio         | My Recently Created Portfolios         | My Recently Created Portfolios        |
| Portfolio         | My Recently Modified Portfolios        | My Recently Modified Portfolios       |
| Portfolio         | PortfolioList                          | Portfolio Lists                       |
| Portfolio         | PortfoliosRecentlyViewedList           | My Recently Viewed Portfolios         |
| ProductIndication | ProductIndication.AllList              | Product Indication Lists              |
| ProductIndication | ProductIndication.AllRecentlyModified  | Recently Modified Product Indications |
| Program           | All Active Partner Programs            | All Active Partner Programs           |
| Program           | All Inactive Partner Programs          | All Inactive Partner Programs         |
| Program           | All Recently Created Partner Programs  | Recently Created Partner Programs     |
| Program           | All Recently Modified Partner Programs | Recently Modified Partner Programs    |
| Program           | HomepagePartnerProgramList             | Partner Programs Lists                |
| Program           | MyRecentlyCreatedPartnerPrograms       | My Recently Created Partner Programs  |
| Program           | MyRecentlyModifiedPartnerPrograms      | My Recently Modified Partner Programs |
| Program           | PartnerProgramsRecentlyViewedList      | My Recently Viewed Partner Programs   |
| Quote             | Quote.AllList                          | Quote Lists                           |

## Homepage Section Layout Mapping ■ Homepage Section Layout Mapping

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name     | Homepage Section Layout Name         | Display Name (ENU)                       |
|-----------------|--------------------------------------|--|
| Quote           | Quote.AllRecentlyCreated             | All Recently Created Quotes              |
| Quote           | Quote.MyRecentlyCreated              | My Recently Created Quotes               |
| Quote           | Quote.RecentlyViewed                 | My Recently Viewed Quotes                |
| SampleRequest   | SampleRequest.AllList                | Sample Request Lists                     |
| SampleRequest   | SampleRequest.AllRecentlyModified    | Recently Modified Sample Requests        |
| Service Request | AllOpenServiceRelatedTasks           | Service Request-Related Tasks            |
| Service Request | HomepageSRLList                      | Service Request Lists                    |
| Service Request | My Open Service Requests Short       | My Open Service Requests                 |
| Service Request | MyCurrentServiceRelatedTasks         | My Current Service Request Related Tasks |
| Service Request | MyOpenServiceRelatedTasks            | My Open Service Request Related Tasks    |
| Service Request | Open Service Request Analysis Report | Open Service Request Analysis            |
| SharedAddress   | SharedAddress.AllList                | Address Lists                            |
| SharedAddress   | SharedAddress.AllRecentlyModified    | Recently Modified Addresses              |
| SocialMedia     | SocialMedia.AllList                  | Social Media Lists                       |
| SocialMedia     | SocialMedia.AllRecentlyModified      | Recently Modified Social Media           |
| SocialProfile   | SocialProfile.AllList                | Social Profile Lists                     |
| SocialProfile   | SocialProfile.AllRecentlyModified    | Recently Modified Social Profiles        |
| Solution        | All Recently Created Solutions       | Recently Created Solutions               |
| Solution        | All Recently Modified Solutions      | Recently Modified Solutions              |
| Solution        | Highest Rated Solutions              | Highest Rated Solutions                  |
| Solution        | Most Active Solutions                | Most Active Solutions                    |
| Solution        | MyRecentlyCreatedSolutions           | My Recently Created Solutions            |
| Solution        | MyRecentlyModifiedSolutions          | My Recently Modified Solutions           |
| Solution        | SolutionList                         | Solution Lists                           |
| Solution        | SolutionsRecentlyViewedList          | My Recently Viewed Solutions             |
| SPRequest       | SPRequest.AllList                    | Special Pricing Request Lists            |
| SPRequest       | SPRequest.AllPending                 | All Pending Special Pricing Requests     |

Table 88. Homepage Section Layout Mapping for Oracle CRM On Demand Objects

| Object Name | Homepage Section Layout Name   | Display Name (ENU)                            |
|-------------|--------------------------------|---|
| SPRequest   | SPRequest.AllRecentlyCreated   | Recently Created Special Pricing Requests     |
| SPRequest   | SPRequest.AllRecentlyModified  | Recently Modified Special Pricing Requests    |
| SPRequest   | SPRequest.MyApproved           | My Approved Special Pricing Requests          |
| SPRequest   | SPRequest.MyPending            | My Pending Special Pricing Requests           |
| SPRequest   | SPRequest.MyRecentlyCreated    | My Recently Created Special Pricing Requests  |
| SPRequest   | SPRequest.MyRecentlyModified   | My Recently Modified Special Pricing Requests |
| SPRequest   | SPRequest.PendingMyApproval    | Special Pricing Requests Pending My Approval  |
| Vehicle     | All Recently Created Vehicles  | Recently Created Vehicles                     |
| Vehicle     | All Recently Modified Vehicles | Recently Modified Vehicles                    |
| Vehicle     | My Recently Created Vehicles   | My Recently Created Vehicles                  |
| Vehicle     | My Recently Modified Vehicles  | My Recently Modified Vehicles                 |
| Vehicle     | VehicleHomepageSRList          | Vehicle-Related Service Requests              |
| Vehicle     | VehicleList                    | Vehicle Lists                                 |
| Vehicle     | VehiclesRecentlyViewedList     | My Recently Viewed Vehicles                   |





# F

## Privilege IDs and Names

This appendix contains the following topic:

- [Privilege IDs and Their Corresponding Names and Descriptions on page 441](#)

### Privilege IDs and Their Corresponding Names and Descriptions

Table 89 lists the privilege IDs in the XML files, and their corresponding privilege names, privilege categories, and privilege descriptions as they appear in the English-American (ENU) user interface of Oracle CRM On Demand.

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id                    | Privilege Name (ENU)                           | Privilege Category (ENU) | Privilege Description (ENU)  |
|---------------------------------|--|--------------------------|--|
| ACCESS_ATT_EXPORT               | Access all Export Request Attachments          | Data Management: Export  | Access attachments for all requests in the Export Queue.   |
| ACCESS_ATT_IMPORT               | Access all Import Request Attachments          | Data Management: Import  | Access attachments for all requests in the Import Queue.   |
| ADMIN_ACTIONBAR_PERSONALIZATION | Personalize Action Bar                         | My Setup                 | Access to Action bar personalization.  |
| ADMIN_ADVANCED_FIELD_MGMT       | Advanced Field Management                      | Customization: Data      | Set up advanced field management features such as advanced default values and custom field validation rules. |
| ADMIN_BATCH_DELETE              | Batch Delete and Restore                       | Data Management          | Delete and restore lists of a record type in a batch.  |
| ADMIN_CHILD_DISPLAY             | Personalize Related Information Display Format | My Setup                 | User can choose the related information display format between tabs or lists.                                |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id                            | Privilege Name (ENU)                                    | Privilege Category (ENU)      | Privilege Description (ENU)  |
|---|---|-------------------------------|--|
| ADMIN_COMP_AUDIT                        | Manage Company - Sign In and Company Audit              | Admin: Company Administration | View the Sign In and Company audit trails.   |
| ADMIN_COMP_PROFILE                      | Manage Company  | Admin: Company Administration | Manage company profile, set security policies, activate languages, define fiscal calendars and create Homepage alerts. |
| ADMIN_CONT_MGMT                         | Manage Content  | Admin: Content Management     | Manage content areas such as products and analytics report folders.  |
| ADMIN_CUSTOM_ICONS                      | Manage Custom Icons                                     | Admin: Content Management     | Upload and manage custom icons.  |
| ADMIN_DETAILPAGE_FIELDS_PERSONALIZATION | Personalize Detail Page - Fields                        | My Setup                      | Access to detail page field personalization.   |
| ADMIN_DETAILPAGE_PERSONALIZATION        | Personalize Detail Page - Related Information           | My Setup                      | Access to detail page related information personalization.   |
| ADMIN_DETAILPAGE_RECORDS_IND_PERS       | Personalize Detail Page - Records Indicator             | My Setup                      | Access to enable or disable related information records indicator.   |
| ADMIN_DYNAMIC_LAYOUT                    | Customize Application - Manage Dynamic Layouts          | Customization: Layout         | Define Dynamic Layouts and assign them to Roles.   |
| ADMIN_EDIT_ACT_STATUS_PICKLIST          | Customize Application - Edit Activity 'Status' Picklist | Customization: Data           | Edit the 'Status' picklist on the Activity object.   |
| ADMIN_EXEC_REPORT_IMMEDIATELY           | Manage Homepage Custom Report Execution                 | Customization: Layout         | Displays the Execute Report Immediately check box on the homepage custom report wizard.                                |
| ADMIN_EXPORT                            | Admin Export  | Data Management: Export       | Export all types of data.  |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id                   | Privilege Name (ENU)                                  | Privilege Category (ENU)         | Privilege Description (ENU)  |
|--------------------------------|---|----------------------------------|--|
| ADMIN_FIELD_AUDIT              | Administer Field Audit                                | Customization: Data              | Add, edit or remove fields from the list of Audited fields for supported objects.  |
| ADMIN_HOMEPAGE_CUSTOMIZATION   | Customize Application - Manage Homepage Customization | Customization: Layout            | Create and manage custom homepages and assign them to Roles  |
| ADMIN_HOMEPAGE_PERSONALIZATION | Personalize Homepages                                 | My Setup                         | Access to homepage personalization.  |
| ADMIN_IMPORT                   | Admin Import  | Data Management: Import          | Import all types of data.  |
| ADMIN_MANAGE_USERS             | Manage Users  | Admin: Users and Access Controls | Manage Users and establish User Quotas.  |
| ADMIN_MASS_UPDATE              | Mass Update   | Data Management                  | Update values across multiple records for a record type.   |
| ADMIN_MERGE_RECORDS            | Merge Records   | Data Management                  | Merge duplicate records into single master record.   |
| ADMIN_PERSONAL_EXTRACT         | Manage Personal Extract                               | Data Management: Export          | Manage and generate personal extracts for offline clients.   |
| ADMIN_SHARED_ADDRESSES         | Manage Addresses                                      | CRM                              | Manage Addresses   |
| ADMIN_TAB_PERSONALIZATION      | Personalize Tabs                                      | My Setup                         | Access to tab personalization.   |
| ADMIN_TERRITORY                | Manage Territories                                    | Admin: Users and Access Controls | Manage Territories and Territory Hierarchy.  |
| ADMIN_USERS_ROLES              | Manage Roles and Access                               | Admin: Users and Access Controls | Define Access Profiles, Roles and Groups to manage data access controls, as well as ability to globally reset layouts for Roles. |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id             | Privilege Name (ENU)                                 | Privilege Category (ENU)         | Privilege Description (ENU)   |
|--------------------------|--|----------------------------------|---|
| ADMIN_WORKFLOW           | Manage Data Rules - Manage Workflow Rules            | Customization: Business Rules    | Define and manage workflow rules  |
| ADMIN_WORKFLOW_USER      | Manage Data Rules - Manage Workflow Rules for Users. | Customization: Business Rules    | Define and manage Workflow rules for Users.   |
| ANALYTICS_PERS_RPTS      | Manage Personal Reports                              | Analytics                        | Manage Analytics Personal Reports   |
| ANALYTICS_SCRIPTING      | Analytics Scripting                                  | Analytics                        | Create Analytics Reports with views and data formats that can contain HTML or JavaScript. |
| ARCHIVE_LEADS            | Archive Leads  | CRM: Marketing                   | Archive Leads that are no longer worth pursuing.  |
| AUDIT_IMPORT             | Manage Record Auditing for Imports                   | Data Management: Import          | Manage the ability to enable or disable record auditing during an import request.         |
| BASIC_SAMPLES_OPERATIONS | Enable Basic Samples Operations                      | Industry Specific: Life Sciences | Manage own Inventory Counts, Reconciliation, Samples Transfers, Other Transactions.       |
| CHANGE_ORG_PASSWORD      | Change Company Passwords using Web Services          | Integration: Web Services        | Change passwords of users in the company using Web Services.                              |
| CHANGE_OWN_PASSWORD      | Reset Personal Password                              | My Setup                         | Allow users to change their current password to a new password.                           |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id                 | Privilege Name (ENU)  | Privilege Category (ENU)         | Privilege Description (ENU)   |
|------------------------------|---|----------------------------------|---|
| CHECK_RELATED_RECORDS        | Check Related Records   | Customization: Business Rules    | Checks related records for the existence of one or more records that matches a specified search criteria, and displays an error message if no match is found. |
| CLIENT_SIDE_EXTENSION_UPLOAD | Upload Client Side Extensions and Manage Custom HTML Head Tag | Customization                    | Ability to upload custom extensions and manage custom HTML head tag.  |
| COD_DASHBOARD                | Access Contact On Demand Dashboard                            | Contact On Demand                | Access the Contact On Demand dashboard.   |
| COD_TOOLBAR                  | Access Communications Tool Bar                                | Contact On Demand                | Access the Contact On Demand Communication tool bar.  |
| CONVERT_DEALREGISTRATIONS    | Convert Deal Registrations                                    | PRM                              | Convert Deal Registrations to Accounts, Contacts and Opportunities.   |
| CONVERT_LEADS                | Convert Leads   | CRM: Marketing                   | Convert Leads to Accounts, Contacts, and Opportunities.   |
| CREATE_CUSTOM_REPORTS        | Manage Custom Reports   | Analytics                        | Create, save, and publish customized Analytics charts and reports.  |
| CREATE_PUBLIC_SMART_CALLS    | Calls: Create Public Smart Calls                              | Industry Specific: Life Sciences | Create public Smart Call templates.   |
| CRM_DESKTOP_ACCESS           | Enable CRM Desktop Access                                     | Desktop/Mobile                   | Download the CRM Desktop Client and synchronize data with CRM On Demand.  |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id             | Privilege Name (ENU)                  | Privilege Category (ENU)         | Privilege Description (ENU)  |
|--------------------------|---------------------------------------|----------------------------------|--|
| CRM_DESKTOP_LITE_IN<br>T | Enable CRM Desktop<br>Lite Access     | Desktop/Mobile                   | Download the CRM<br>Desktop Lite Client<br>and synchronize data<br>with CRM On Demand.   |
| CTI_ACCESS_CALL          | Access Call<br>Communications         | Integration: CTI                 | Access to calls from<br>Communication<br>Homepage.   |
| CTI_ACCESS_CHAT          | Access Chat<br>Communications         | Integration: CTI                 | Access to chats from<br>Communication<br>Homepage.   |
| CTI_ACCESS_EMAIL         | Access Email<br>Communications        | Integration: CTI                 | Access to emails from<br>Communication<br>Homepage.  |
| CTI_ACCESS_VMAIL         | Access Voicemail<br>Communications    | Integration: CTI                 | Access to voicemails<br>from Communication<br>Homepage.  |
| CUSTOMIZE_APP            | Customize Application                 | Customization                    | Create custom page<br>layouts, homepage<br>layouts, change field<br>names, modify field<br>picklists, define<br>cascading picklists,<br>create custom fields<br>and rename objects.                                      |
| DEFINE_ASSIGN_RULES      | Data Rules and<br>Assignment          | Customization:<br>Business Rules | Define routing rules<br>for Leads, Accounts,<br>Opportunities and<br>Service Requests.<br>Administer Forecasts,<br>Lead Conversion<br>Mapping and Lead<br>Conversion Layouts,<br>and set up Industry<br>picklist values. |
| DEFINE_CURRENCIES        | Manage Company -<br>Define Currencies | Admin: Company<br>Administration | Manage currencies<br>and exchange rates.   |
| DEFINE_PUBLIC_LISTS      | Manage Public Lists                   | Data Management                  | Create, Edit and<br>Delete Public Lists.   |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id               | Privilege Name (ENU)                               | Privilege Category (ENU)      | Privilege Description (ENU)   |
|----------------------------|--|-------------------------------|---|
| DEFINE_SALES_PROCESSES     | Manage Data Rules - Manage Sales Stage Definition  | Customization: Business Rules | Define Sales Methodologies and company-specific Sales Processes.  |
| DELETE_ANY_ACTIVITY        | Delete Any Activity                                | Data Management               | Delete any Activity regardless of record state, privacy, or relationship.                                       |
| DEPLOY_CUSTOM_CODE         | Deploy Custom Code                                 | Integration: Hosting          | Deploy custom Web applications to the (Java Cloud).   |
| ELOQUA_INT                 | Oracle Eloqua Marketing Cloud Service Integration  | Integration: Eloqua           | Enable integration with Oracle Eloqua Marketing Cloud Service   |
| ELOQUA_INTEGRATION         | Eloqua Integration                                 | CRM: Marketing                | Enable integration with Eloqua  |
| EXPOSE_ALL_FIELDS          | All fields in Search and Lists                     | Customization: Layout         | Expose all fields in Advanced Search and Lists. This includes fields that are not displayed in the Detail Page. |
| FULL_ACCESS_ANALYTICS      | Access All Data in Analytics                       | Analytics                     | Access all data in Analytics charts and reports.  |
| FULL_ACCESS_FORECASTS      | Access All Forecasts                               | CRM: Sales                    | Manage forecast frequency and participants, and access all Forecasts.   |
| FUSION_MOBILE              | Connected Mobile Sales Access                      | Desktop/Mobile                | Enable access to the Connected Mobile Sales Application.  |
| FUSION_MOBILE_APP_COMPOSER | Connected Mobile Sales Application Composer Access | Desktop/Mobile                | Enable access to the Connected Mobile Sales Application Composer.   |
| GRANT_ASSESSMENTS          | Manage Assessments Access                          | CRM                           | Manage access to Assessments.   |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id               | Privilege Name (ENU)                                | Privilege Category (ENU)         | Privilege Description (ENU)                                       |
|----------------------------|---|----------------------------------|---|
| GRANT_BUSNPLAN             | Manage Business Planning Access                     | CRM: Sales                       | Manage access to Account Planning                                 |
| GRANT_CALLS                | Calls: Manage Calls                                 | Industry Specific: Life Sciences | Manage access to Calls.   |
| GRANT_CHANGE_ORG_PASSWORD  | Manage Company Password Access                      | Integration: Web Services        | Manage access to Change Company Password privilege.               |
| GRANT_COD                  | Manage Contact On Demand Access                     | Contact On Demand                | Manage access to Contact On Demand.                               |
| GRANT_CONTACT_INTERESTS    | Manage Contact Interests Access                     | CRM                              | Manage access to Contact Interests.                               |
| GRANT_CRM_DESKTOP_INT      | Manage CRM Desktop Access                           | Desktop/Mobile                   | Customize CRM Desktop metadata and manage access for CRM Desktop. |
| GRANT_CRM_DESKTOP_LITE_INT | Manage CRM Desktop Lite Access                      | Desktop/Mobile                   | Manage access for CRM Desktop Lite.                               |
| GRANT_CTI                  | Manage CTI On Demand Access                         | Integration: CTI                 | Manage access to CTI On Demand Integration.                       |
| GRANT_CUSTOM_OBJ1          | Customize Application - Manage Custom Object 01     | Customization: Data              | Manage access to Custom Object 01.                                |
| GRANT_CUSTOM_OBJ11-15      | Customize Application - Manage Custom Objects 11-15 | Customization: Data              | Manage access to Custom Objects 11-15.                            |
| GRANT_CUSTOM_OBJ16-20      | Customize Application - Manage Custom Objects 16-20 | Customization: Data              | Manage access to Custom Objects 16-20.                            |
| GRANT_CUSTOM_OBJ2          | Customize Application - Manage Custom Object 02     | Customization: Data              | Manage access to Custom Object 02.                                |
| GRANT_CUSTOM_OBJ21-25      | Customize Application - Manage Custom Objects 21-25 | Customization: Data              | Manage access to Custom Objects 21-25.                            |



Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id         | Privilege Name (ENU)                                     | Privilege Category (ENU)              | Privilege Description (ENU)   |
|----------------------|--|---------------------------------------|---|
| GRANT_CUSTOM_OBJ2630 | Customize Application - Manage Custom Objects 26-30      | Customization: Data                   | Manage access to Custom Objects 26-30.                              |
| GRANT_CUSTOM_OBJ3    | Customize Application - Manage Custom Object 03          | Customization: Data                   | Manage access to Custom Object 03.                                  |
| GRANT_CUSTOM_OBJ3135 | Customize Application - Manage Custom Objects 31-35      | Customization: Data                   | Manage access to Custom Objects 31-35.                              |
| GRANT_CUSTOM_OBJ3640 | Customize Application - Manage Custom Objects 36-40      | Customization: Data                   | Manage access to Custom Objects 36-40.                              |
| GRANT_CUSTOM_OBJ410  | Customize Application - Manage Custom Objects 04-10      | Customization: Data                   | Manage access to Custom Objects 04-10.                              |
| GRANT_DEALERS        | Manage Dealers Access                                    | Industry Specific: Automotive         | Manage access to Dealers.   |
| GRANT_ELOQUA_INT     | Manage Oracle Eloqua Marketing Cloud Service Integration | Integration: Eloqua                   | Manage access to Oracle Eloqua Marketing Cloud Service integration. |
| GRANT_FIN            | Manage Banking Custom Objects                            | Industry Specific: Financial Services | Manage access to Finance objects.                                   |
| GRANT_FUND_REQS      | Manage Fund Requests Access                              | CRM: Partners                         | Manage access to Fund Requests                                      |
| GRANT_FUNDS          | Manage Funds Access                                      | CRM: Partners                         | Manage access to Funds  |
| GRANT_FUSION_MOBILE  | Manage Connected Mobile Sales Access                     | Desktop/Mobile                        | Manage access to Connected Mobile Sales.                            |
| GRANT_HOUSEHOLDS     | Manage Households Access                                 | Industry Specific: Financial Services | Manage access to Households.  |
| GRANT_INSUR          | Manage Insurance Custom Objects                          | Industry Specific: Financial Services | Manage access to Insurance Objects.                                 |
| GRANT_ISALES_INT     | Manage Disconnected Mobile Sales Access                  | Desktop/Mobile                        | Manage access to Disconnected Mobile Sales.                         |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id         | Privilege Name (ENU)                                    | Privilege Category (ENU)              | Privilege Description (ENU)                                 |
|----------------------|---|---------------------------------------|---|
| GRANT_MAPS_INT       | Manage Maps Integration                                 | Integration: Maps                     | Manage access to Maps Integration                           |
| GRANT_MEDED          | Manage Events Access                                    | Industry Specific: Life Sciences      | Manage access to Events.                                    |
| GRANT_MOD_TRACKING   | Manage Modification Tracking                            | Admin: Company Administration         | Manage Modification Tracking.                               |
| GRANT_ORDER_MGMT_INT | Enable Order Access                                     | CRM: Sales                            | Enable Pre-Built Integration to Order Management System     |
| GRANT_OSN_INT        | Manage Oracle Social Network Integration                | Integration: OSN                      | Manage access to Oracle Social Network Integration          |
| GRANT_PATIENTS       | Manage Patients Access                                  | Industry Specific: Life Sciences      | Manage access to Patients.                                  |
| GRANT_PCD            | Manage Personalized Content Delivery                    | Industry Specific: Life Sciences      | Manage access to Personalized Content Delivery              |
| GRANT_PERIOD         | Manage Period Administration                            | CRM: Sales                            | Manage access to Period Administration                      |
| GRANT_PHARMA         | Manage Pharmaceutical Access                            | Industry Specific: Life Sciences      | Manage access to Pharmaceutical                             |
| GRANT_PORTFOLIOS     | Manage Portfolios Access                                | Industry Specific: Financial Services | Manage access to Portfolios.                                |
| GRANT_PRM            | Manage PRM Access                                       | PRM                                   | Manage access to PRM.                                       |
| GRANT_QUOTE_MGMT_INT | Enable Quote Creation Access                            | Integration: Pre-Built                | Enable Pre-Built Integration to Quote Management System     |
| GRANT_REFERRALS      | Manage Referrals  | CRM: Sales                            | Manage access to Referrals.                                 |
| GRANT_RELATIONSHIPS  | Manage Extended Contact and Account Relationship Access | CRM                                   | Manage access to extended Contact and Account Relationship. |
| GRANT_REVENUES       | Manage Contact and Account Revenues Access              | CRM: Sales                            | Manage access to Revenues.                                  |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id              | Privilege Name (ENU)  | Privilege Category (ENU)         | Privilege Description (ENU)   |
|---------------------------|---|----------------------------------|---|
| GRANT_SEM_INT             | Manage Social Engagement & Monitoring Access                  | Integration: SEM                 | Manage access to Social Engagement & Monitoring Integration                                   |
| GRANT_SONGO_CLIENT        | Manage Incremental Down Sync for Life Sciences Offline Client | Industry Specific: Life Sciences | Manage Incremental Down Sync for Life Sciences Offline Client                                 |
| GRANT_VEHICLES            | Manage Vehicles Access  | Industry Specific: Automotive    | Manage access to Vehicles.  |
| GRANT_WEB_SERVICES_INT    | Manage Access to Web Services                                 | Integration: Web Services        | Manage access to Enable Web Services Access privilege.  |
| ISALES_INT                | Disconnected Mobile Sales Access                              | Desktop/Mobile                   | Enable access to Disconnected Mobile Sales.   |
| LIST_EXPORT               | List - Export Displayed Fields                                | Data Management: Export          | Export fields displayed on a list.  |
| LIST_EXPORT_ALL_FIELDS    | List - Export All Fields                                      | Data Management: Export          | Export all fields for a Record Type. This includes fields that are not displayed in the List. |
| LS_PLANNED_CALLS          | Calls: Calendar Planned Calls                                 | Industry Specific: Life Sciences | Display Planned Calls Applet in Calendar  |
| LS_SONGO_ADMIN            | Enable Life Sciences Offline Client Admin Functionality       | Industry Specific: Life Sciences | Enable Life Sciences Offline Client Admin Functionality                                       |
| MANAGE_ACCT_RELATIONSHIPS | Access Extended Account Relationship                          | CRM: Sales                       | Create, edit and delete Extended Account Relationship.  |
| MANAGE_ATTACHMENTS        | Manage Content - Manage Attachments and Detail Page Images    | Admin: Content Management        | Manage all Attachments and all Detail Page Images.  |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id                  | Privilege Name (ENU)                             | Privilege Category (ENU)         | Privilege Description (ENU)  |
|-------------------------------|--|----------------------------------|--|
| MANAGE_BOOKS                  | Manage Books                                     | Admin: Users and Access Controls | Manage Book access, bulk assign data to Books and define Book related workflows.   |
| MANAGE_CAMPAGNS               | Manage Campaigns                                 | CRM: Marketing                   | Create and edit Campaigns.   |
| MANAGE_CUSTOM_WEB_APPLETS     | Manage Custom Web Applets                        | Integration: Widgets             | Create, edit and publish custom web applets.   |
| MANAGE_DASHBOARDS             | Manage Dashboards                                | Analytics                        | Create, manage and design custom dashboards.   |
| MANAGE_DELEGATES              | Manage Users and Access - Manage Delegated Users | Admin: Users and Access Controls | Manage delegation of a user's data visibility and access rights to other users.  |
| MANAGE_DYNAMIC_CUSTOM_OBJECTS | Manage Dynamic Custom Objects                    | Customization: Data              | Define and apply dynamic custom objects.   |
| MANAGE_FUTURE_BOOKS           | Manage Future Books                              | Admin: Users and Access Controls | Create future data and Book relationships based on start date using Import or Web Services. Expire data and Book relationships based on end date using Import or Web Services. |
| MANAGE_PRM_BK_WF              | Manage PRM Books and Workflows                   | PRM                              | Setup PRM Books and configure PRM Workflows.   |
| MANAGE_THEMES                 | Manage Themes                                    | Admin: Company Administration    | Create and manage Themes   |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id                    | Privilege Name (ENU)                                    | Privilege Category (ENU)       | Privilege Description (ENU)  |
|---------------------------------|---|--------------------------------|--|
| MANAGE_UAN_QUEUE                | Enable Integration Event Access                         | Integration: Integration Event | Enable the ability to get and delete events from Integration Event queue(s) using Web services   |
| MAPS_INT                        | Maps Integration  | Integration: Maps              | Enable integration with Maps   |
| MARKETING_IMPORT                | Marketing Import  | Data Management: Import        | Import Leads, Accounts, Contacts, Products and Assets.   |
| MASTER_AUDIT_TABLE              | Access Master Audit Trail and Admin Configuration Audit | Admin: Company Administration  | Ability to access the Master Audit Trail that displays all auditable data changes across the application and Admin Configuration Audit that displays changes that users have made to various admin configurations. |
| ODM_INTEGRATION                 | CRM On Demand Marketing Access                          | CRM On Demand Marketing        | Enable access to CRM On Demand Marketing.  |
| OEI_NEI                         | Outlook/Notes Email Integration                         | Desktop/Mobile                 | Link emails to Account, Contact, Lead, Opportunity, or Service Request records.  |
| OPS_EDIT_COMP_STAT US           | Edit Company Status for Operations                      | Admin: Company Administration  | Edit the status of any Company to values that are available only to Operations personnel.  |
| OSN_INT                         | Oracle Social Network Integration                       | Integration: OSN               | Enable integration with Oracle Social Network applications   |
| OVERRIDE_PROCESS_ADMINISTRATION | Override Process Administration                         | Customization: Business Rules  | Bypass all Process Administration business rules.  |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id            | Privilege Name (ENU)                          | Privilege Category (ENU)      | Privilege Description (ENU)  |
|-------------------------|---|-------------------------------|--|
| PARTNER_OFFERINGS       | Partner Offerings                             | CRM: Marketing                | Display recommended partners within CRM On Demand under My Setup                                     |
| PARTNER_TRIAL_OFFERINGS | Partner Trial Offerings                       | CRM: Marketing                | Display recommended Partners in the Action Bar (English Only).                                       |
| PERSONAL_EXPORT         | Personal Export                               | Data Management: Export       | Export data to which the role has read access.   |
| PERSONAL_IMPORT         | Personal Import                               | My Setup                      | Import your Contacts   |
| PRM_PARTNER_ADMIN       | Manage Users within the Partner Organization. | PRM                           | Manage Users within the Partner Organization.  |
| PROCESS_ADMINISTRATION  | Process Administration                        | Customization: Business Rules | Define role-based business processes with conditional state transitions and dynamic access controls. |
| PRODUCER_WIDGETS        | Embed CRM On Demand Widgets                   | Integration: Widgets          | Access CRM On Demand content outside of the CRM On Demand application.                               |
| PUBLISH_SOLUTIONS       | Publish Solutions                             | CRM                           | Approve and edit Solutions.  |
| QUALIFY_LEADS           | Qualify Leads                                 | CRM: Marketing                | Classify Leads as being Qualified.   |
| RECOVER_ALL_RECORDS     | Recover All Records                           | Data Management               | Recover Deleted Items discarded by any user.   |
| REJECT_LEADS            | Reject Leads                                  | CRM: Marketing                | Reject previously Qualified Leads.   |
| RESET_ORG_PASSWORD      | Manage Company - Reset All Passwords          | Admin: Company Administration | Reset passwords of all users of your company.  |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id              | Privilege Name (ENU)                                   | Privilege Category (ENU)         | Privilege Description (ENU)   |
|---------------------------|--|----------------------------------|---|
| REST_SERVICES_INT         | Restful Services Integration                           | Integration: Restful Services    | Send requests to the Restful Services Integration.                  |
| SAMPLES_ADJUSTMENT        | Enable Samples Adjustment                              | Industry Specific: Life Sciences | Adjust Transactions   |
| SEM_INT                   | Social Engagement & Monitoring Integration             | Integration: SEM                 | Enable integration with Social Engagement & Monitoring applications |
| SHARED_CALENDAR           | Share Calendar   | CRM                              | Share calendars with other users in the company.                    |
| TAB_ANALYTICS             | Access Analytics Dashboards                            | Analytics                        | Access the Analytics Dashboard.                                     |
| TAB_COMMUNICATIONS        | Access Communications Homepage                         | Contact On Demand                | Access the Communications homepage.                                 |
| TAB_REPORTS               | Access Analytics Reports                               | Analytics                        | Access the Analytics Reports tab.                                   |
| USAGE_TRACKING            | Usage Tracking   | Analytics                        | Access the Usage Tracking subject area.                             |
| USE_CALLS                 | Calls: Enable Call Detailing                           | Industry Specific: Life Sciences | Add and edit Account Calls and Contact Calls.                       |
| VALIDATE_SHARED_ADDRESSES | Validate Shared Addresses                              | CRM                              | Mark Shared Addresses as validated                                  |
| VIEW_MASKED_DATA          | View Masked Data                                       | CRM                              | See the full value of fields that are masked.                       |
| VIEW_PREBUILT_DASHBOARDS  | Access Analytics Dashboards - View Prebuilt Dashboards | Analytics                        | Access the Analytics Prebuilt Dashboards.                           |
| VIEW_PREBUILT_REPORTS     | Access Analytics Reports - View Prebuilt Analyses      | Analytics                        | View and execute prebuilt analyses and reports.                     |

Table 89. Privilege IDs and Their Corresponding Names and Descriptions in Oracle CRM On Demand ENU User Interface

| Privilege Id            | Privilege Name (ENU)       | Privilege Category (ENU)      | Privilege Description (ENU)                               |
|-------------------------|----------------------------|-------------------------------|---|
| VIEW_PRIVATE_ACTIVITIES | View Private Activities    | Data Management               | View private activities for all users of your company.    |
| VIEW_PRIVATE_NOTES      | View Private Notes         | Data Management               | View private notes for all users of your company.         |
| WEB_SERVICES_INT        | Enable Web Services Access | Integration: Web Services     | Enable the ability to send Web services requests.         |
| WORKFLOW_CANCEL_SAVE    | Workflow Cancel Save       | Customization: Business Rules | Prevent save operation on 'Before Modified Record Saved'. |



# G

## Child Applet IDs and Names

This appendix contains the following topic:

- [Child Applet IDs and Their Corresponding Names on page 457](#)

### Child Applet IDs and Their Corresponding Names

Table 90 shows the mapping of child applet IDs in page layout XML files to their corresponding child applet names as they appear in the English-American user interface of Oracle CRM On Demand. The objects for which the child applets can be configured are also shown in the table.

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id               | Child Applet Name     |
|--------------------|-------------------------------|-----------------------|
| Account            | AccountBookChildList          | Books                 |
| Account            | AccountCallChildList          | Calls                 |
| Account            | AccountCompetitorChildList    | Account Competitors   |
| Account            | AccountEvent.ChildList        | Account Event         |
| Account            | AccountFACHildList            | Attachments           |
| Account            | AccountNoteChildList          | Notes                 |
| Account            | AccountPartnerChildList       | Account Partners      |
| Account            | AccountPortfolioChildList     | Portfolio             |
| Account            | AccountRelationshipChildList  | Account Relationships |
| Account            | AccountSurveyChildList        | Account Survey        |
| Account            | AccountTeamChildList          | Account Team          |
| Account            | ActivityClosedChildList       | Completed Activities  |
| Account            | ActivityOpenChildList         | Open Activities       |
| Account            | AddressChildList              | Addresses             |
| Account            | AppointmentOpenChildList      | Open Appointments     |
| Account            | AssetChildList                | Assets                |
| Account            | Audit Trail.ChildList         | Audit Trail           |
| Account            | CallActivityHistory.ChildList | Call Activity History |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                                  | Child Applet Name                        |
|--------------------|--|--|
| Account            | Claim.ChildList                                  | Claims                                   |
| Account            | ContactPersonChildList                           | Contacts                                 |
| Account            | CRMODLS_BPL_ACNT.ChildList                       | Plan Accounts                            |
| Account            | CRMODLS_BusinessPlan.ChildList                   | Business Plans                           |
| Account            | CRMODLS_OBJECTIVE.ChildList                      | Objectives                               |
| Account            | CustObj1ChildList                                | Custom Objects 01                        |
| Account            | CustObj2ChildList                                | Custom Objects 02                        |
| Account            | CustObj3ChildList                                | Custom Objects 03                        |
| Account            | CustomObject10.ChildList                         | Custom Objects 10                        |
| Account            | CustomObject11.ChildList                         | Custom Objects 11                        |
| Account            | CustomObject12.ChildList                         | Custom Objects 12                        |
| Account            | CustomObject13.ChildList                         | Custom Objects 13                        |
| Account            | CustomObject14.ChildList                         | Custom Objects 14                        |
| Account            | CustomObject15.ChildList                         | Custom Objects 15                        |
| Account            | CustomObject4.ChildList                          | Custom Objects 04                        |
| Account            | CustomObject5.ChildList                          | Custom Objects 05                        |
| Account            | CustomObject6.ChildList                          | Custom Objects 06                        |
| Account            | CustomObject7.ChildList                          | Custom Objects 07                        |
| Account            | CustomObject8.ChildList                          | Custom Objects 08                        |
| Account            | CustomObject9.ChildList                          | Custom Objects 09                        |
| Account            | DealerVehicleChildList                           | Vehicles                                 |
| Account            | DealRegistration.ChildList                       | Deal Registrations                       |
| Account            | FinancialAccount.Branch.ChildList                | Financial Account: Branch                |
| Account            | FinancialAccount.ChildList                       | Financial Accounts                       |
| Account            | FinancialAccount.Held_Away_Institution.ChildList | Financial Account: Held Away Institution |
| Account            | FinancialAccountHolder.ChildList                 | Financial Account Holders                |
| Account            | FinancialPlan.ChildList                          | Financial Plans                          |
| Account            | LeadChildList                                    | Leads                                    |
| Account            | OptyChildList                                    | Opportunities                            |
| Account            | OracleSocialNetwork.ChildList                    | Social                                   |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name                    |
|--------------------|---------------------------------|--------------------------------------|
| Account            | Order.ChildList                 | Orders                               |
| Account            | Policy.ChildList                | Policies                             |
| Account            | PolicyHolder.ChildList          | Policy Holders                       |
| Account            | Quote.ChildList                 | Quotes                               |
| Account            | RevenueChildList                | Revenues                             |
| Account            | SampleRequest.ChildList         | Sample Requests                      |
| Account            | SPRequest.ChildList             | Special Pricing Requests             |
| Account            | SRChildList                     | Service Requests                     |
| Account            | SubAccountChildList             | Sub-Accounts                         |
| Account            | TaskOpenChildList               | Open Tasks                           |
| AccountCall        | AccountCallContactChildList     | Contacts                             |
| AccountCall        | ActionFACHildList               | Attachments                          |
| AccountCall        | ActionUserChildList             | Users                                |
| AccountCall        | Activity Book.ChildList         | Books                                |
| AccountCall        | ActivityAssessmentChildList     | Activity Assessments                 |
| AccountCall        | AttendeeCallChildList           | Attendees                            |
| AccountCall        | Audit Trail.ChildList           | Audit Trail                          |
| AccountCall        | CallsMessagePlanVBCChildList    | Available Message Plans              |
| AccountCall        | CallsProdDetailChildList        | Products Detailed                    |
| AccountCall        | CallsProdDetailVBCChildList     | Available Products for Detailing     |
| AccountCall        | CallsPromItemDropChildList      | Promotional Items                    |
| AccountCall        | CallsPromItemDropVBCChildList   | Available Promotional Items for Drop |
| AccountCall        | CallsSampDropChildList          | Samples Dropped                      |
| AccountCall        | CallsSampDropVBCChildList       | Available Samples for Drop           |
| AccountCall        | CRMOD_LS_Transactions.ChildList | Sample Transactions                  |
| AccountCall        | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses                    |
| AccountCall        | CRMODLS_Signature.ChildList     | Signature                            |
| AccountCall        | CustObj1ChildList               | Custom Objects 01                    |
| AccountCall        | CustObj2ChildList               | Custom Objects 02                    |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                        | Child Applet Name                        |
|--------------------|--|--|
| AccountCall        | CustObj3ChildList                      | Custom Objects 03                        |
| AccountCall        | CustomObject10.ChildList               | Custom Objects 10                        |
| AccountCall        | CustomObject11.ChildList               | Custom Objects 11                        |
| AccountCall        | CustomObject12.ChildList               | Custom Objects 12                        |
| AccountCall        | CustomObject13.ChildList               | Custom Objects 13                        |
| AccountCall        | CustomObject14.ChildList               | Custom Objects 14                        |
| AccountCall        | CustomObject15.ChildList               | Custom Objects 15                        |
| AccountCall        | CustomObject4.ChildList                | Custom Objects 04                        |
| AccountCall        | CustomObject5.ChildList                | Custom Objects 05                        |
| AccountCall        | CustomObject6.ChildList                | Custom Objects 06                        |
| AccountCall        | CustomObject7.ChildList                | Custom Objects 07                        |
| AccountCall        | CustomObject8.ChildList                | Custom Objects 08                        |
| AccountCall        | CustomObject9.ChildList                | Custom Objects 09                        |
| AccountCall        | Fund Request.ChildList                 | Fund Requests                            |
| AccountCall        | MedEdSolutionChildList                 | Solutions                                |
| AccountCall        | Order.ChildList                        | Orders                                   |
| AccountCall        | SampleRequest.ChildList                | Sample Requests                          |
| Accreditation      | Accreditation Book.ChildList           | Books                                    |
| Accreditation      | AccreditationAttachment.ChildList      | Accreditation Attachments                |
| Accreditation      | AccreditationCertification.ChildList   | Accreditation Certifications             |
| Accreditation      | AccreditationProduct.ChildList         | Accreditation Products                   |
| Accreditation      | AccreditationProductCategory.ChildList | Accreditation Product Product Categories |
| Accreditation      | AccreditationRelationship.ChildList    | Related Accreditations                   |
| Accreditation      | AccreditationRequest.ChildList         | Accreditation Requests                   |
| Accreditation      | AccreditationSolution.ChildList        | Accreditation Solutions                  |
| Accreditation      | AccreditationTeam.ChildList            | Accreditation Teams                      |
| Accreditation      | Custom Object 1.ChildList              | Custom Objects 01                        |
| Accreditation      | Custom Object 2.ChildList              | Custom Objects 02                        |
| Accreditation      | Custom Object 3.ChildList              | Custom Objects 03                        |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name   |
|--------------------|---------------------------------|---------------------|
| Accreditation      | CustomObject10.ChildList        | Custom Objects 10   |
| Accreditation      | CustomObject11.ChildList        | Custom Objects 11   |
| Accreditation      | CustomObject12.ChildList        | Custom Objects 12   |
| Accreditation      | CustomObject13.ChildList        | Custom Objects 13   |
| Accreditation      | CustomObject14.ChildList        | Custom Objects 14   |
| Accreditation      | CustomObject15.ChildList        | Custom Objects 15   |
| Accreditation      | CustomObject4.ChildList         | Custom Objects 04   |
| Accreditation      | CustomObject5.ChildList         | Custom Objects 05   |
| Accreditation      | CustomObject6.ChildList         | Custom Objects 06   |
| Accreditation      | CustomObject7.ChildList         | Custom Objects 07   |
| Accreditation      | CustomObject8.ChildList         | Custom Objects 08   |
| Accreditation      | CustomObject9.ChildList         | Custom Objects 09   |
| Activity           | Activity Book.ChildList         | Books               |
| Activity           | Audit Trail.ChildList           | Audit Trail         |
| Activity           | CRMOD_LS_Transactions.ChildList | Sample Transactions |
| Activity           | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses   |
| Activity           | CRMODLS_Signature.ChildList     | Signature           |
| Activity           | CustomObject10.ChildList        | Custom Objects 10   |
| Activity           | CustomObject11.ChildList        | Custom Objects 11   |
| Activity           | CustomObject12.ChildList        | Custom Objects 12   |
| Activity           | CustomObject13.ChildList        | Custom Objects 13   |
| Activity           | CustomObject14.ChildList        | Custom Objects 14   |
| Activity           | CustomObject15.ChildList        | Custom Objects 15   |
| Activity           | CustomObject4.ChildList         | Custom Objects 04   |
| Activity           | CustomObject5.ChildList         | Custom Objects 05   |
| Activity           | CustomObject6.ChildList         | Custom Objects 06   |
| Activity           | CustomObject7.ChildList         | Custom Objects 07   |
| Activity           | CustomObject8.ChildList         | Custom Objects 08   |
| Activity           | CustomObject9.ChildList         | Custom Objects 09   |
| Activity           | Fund Request.ChildList          | Fund Requests       |
| Activity           | Order.ChildList                 | Orders              |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name       |
|--------------------|---------------------------------|-------------------------|
| Activity           | SampleRequest.ChildList         | Sample Requests         |
| Application        | Activity.ChildList              | Activities              |
| Application        | ActivityClosedChildList         | Completed Activities    |
| Application        | Application Book.ChildList      | Books                   |
| Application        | ApplicationAttachment.ChildList | Application Attachments |
| Application        | ApplicationTeam.ChildList       | Application Teams       |
| Application        | AppointmentOpenChildList        | Open Appointments       |
| Application        | Audit Trail.ChildList           | Audit Trail             |
| Application        | TaskOpenChildList               | Open Tasks              |
| Appointment        | ActionContactChildList          | Contacts                |
| Appointment        | ActionFACHildList               | Attachments             |
| Appointment        | ActionUserChildList             | Users                   |
| Appointment        | ActivityAssessmentChildList     | Activity Assessments    |
| Appointment        | ActivityBookChildList           | Books                   |
| Appointment        | Audit Trail.ChildList           | Audit Trail             |
| Appointment        | CRMOD_LS_Transactions.ChildList | Sample Transactions     |
| Appointment        | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses       |
| Appointment        | CRMODLS_Signature.ChildList     | Signature               |
| Appointment        | CustObj1ChildList               | Custom Objects 01       |
| Appointment        | CustObj2ChildList               | Custom Objects 02       |
| Appointment        | CustObj3ChildList               | Custom Objects 03       |
| Appointment        | CustomObject10.ChildList        | Custom Objects 10       |
| Appointment        | CustomObject11.ChildList        | Custom Objects 11       |
| Appointment        | CustomObject12.ChildList        | Custom Objects 12       |
| Appointment        | CustomObject13.ChildList        | Custom Objects 13       |
| Appointment        | CustomObject14.ChildList        | Custom Objects 14       |
| Appointment        | CustomObject15.ChildList        | Custom Objects 15       |
| Appointment        | CustomObject4.ChildList         | Custom Objects 04       |
| Appointment        | CustomObject5.ChildList         | Custom Objects 05       |
| Appointment        | CustomObject6.ChildList         | Custom Objects 06       |
| Appointment        | CustomObject7.ChildList         | Custom Objects 07       |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name                    |
|--------------------|---------------------------------|--------------------------------------|
| Appointment        | CustomObject8.ChildList         | Custom Objects 08                    |
| Appointment        | CustomObject9.ChildList         | Custom Objects 09                    |
| Appointment        | Fund Request.ChildList          | Fund Requests                        |
| Appointment        | MedEdSolutionChildList          | Solutions                            |
| Appointment        | Order.ChildList                 | Orders                               |
| Appointment        | SampleRequest.ChildList         | Sample Requests                      |
| Attendee Call      | Activity Book.ChildList         | Books                                |
| Attendee Call      | Audit Trail.ChildList           | Audit Trail                          |
| Attendee Call      | CallsProdDetailChildList        | Products Detailed                    |
| Attendee Call      | CallsProdDetailVBCChildList     | Available Products for Detailing     |
| Attendee Call      | CallsPromItemDropChildList      | Promotional Items                    |
| Attendee Call      | CallsPromItemDropVBCChildList   | Available Promotional Items for Drop |
| Attendee Call      | CallsSampDropChildList          | Samples Dropped                      |
| Attendee Call      | CallsSampDropVBCChildList       | Available Samples for Drop           |
| Attendee Call      | CRMOD_LS_Transactions.ChildList | Sample Transactions                  |
| Attendee Call      | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses                    |
| Attendee Call      | CRMODLS_Signature.ChildList     | Signature                            |
| Attendee Call      | CustObj1ChildList               | Custom Objects 01                    |
| Attendee Call      | CustObj2ChildList               | Custom Objects 02                    |
| Attendee Call      | CustObj3ChildList               | Custom Objects 03                    |
| Attendee Call      | CustomObject10.ChildList        | Custom Objects 10                    |
| Attendee Call      | CustomObject11.ChildList        | Custom Objects 11                    |
| Attendee Call      | CustomObject12.ChildList        | Custom Objects 12                    |
| Attendee Call      | CustomObject13.ChildList        | Custom Objects 13                    |
| Attendee Call      | CustomObject14.ChildList        | Custom Objects 14                    |
| Attendee Call      | CustomObject15.ChildList        | Custom Objects 15                    |
| Attendee Call      | CustomObject4.ChildList         | Custom Objects 04                    |
| Attendee Call      | CustomObject5.ChildList         | Custom Objects 05                    |
| Attendee Call      | CustomObject6.ChildList         | Custom Objects 06                    |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id           | Child Applet Name    |
|--------------------|---------------------------|----------------------|
| Attendee Call      | CustomObject7.ChildList   | Custom Objects 07    |
| Attendee Call      | CustomObject8.ChildList   | Custom Objects 08    |
| Attendee Call      | CustomObject9.ChildList   | Custom Objects 09    |
| Attendee Call      | Fund Request.ChildList    | Fund Requests        |
| Attendee Call      | Order.ChildList           | Orders               |
| Attendee Call      | SampleRequest.ChildList   | Sample Requests      |
| BrokerProfile      | Custom Object 1.ChildList | Custom Objects 01    |
| BrokerProfile      | Custom Object 2.ChildList | Custom Objects 02    |
| BrokerProfile      | Custom Object 3.ChildList | Custom Objects 03    |
| BrokerProfile      | CustomObject10.ChildList  | Custom Objects 10    |
| BrokerProfile      | CustomObject11.ChildList  | Custom Objects 11    |
| BrokerProfile      | CustomObject12.ChildList  | Custom Objects 12    |
| BrokerProfile      | CustomObject13.ChildList  | Custom Objects 13    |
| BrokerProfile      | CustomObject14.ChildList  | Custom Objects 14    |
| BrokerProfile      | CustomObject15.ChildList  | Custom Objects 15    |
| BrokerProfile      | CustomObject4.ChildList   | Custom Objects 04    |
| BrokerProfile      | CustomObject5.ChildList   | Custom Objects 05    |
| BrokerProfile      | CustomObject6.ChildList   | Custom Objects 06    |
| BrokerProfile      | CustomObject7.ChildList   | Custom Objects 07    |
| BrokerProfile      | CustomObject8.ChildList   | Custom Objects 08    |
| BrokerProfile      | CustomObject9.ChildList   | Custom Objects 09    |
| Campaign           | ActivityClosedChildList   | Completed Activities |
| Campaign           | ActivityOpenChildList     | Open Activities      |
| Campaign           | Application.ChildList     | Applications         |
| Campaign           | AppointmentOpenChildList  | Open Appointments    |
| Campaign           | Campaign Book.ChildList   | Books                |
| Campaign           | CampaignContChildList     | Recipients           |
| Campaign           | CampaignFACChildList      | Attachments          |
| Campaign           | CampaignNoteChildList     | Notes                |
| Campaign           | CustObj1ChildList         | Custom Objects 01    |
| Campaign           | CustObj2ChildList         | Custom Objects 02    |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                        | Child Applet Name                        |
|--------------------|--|--|
| Campaign           | CustObj3ChildList                      | Custom Objects 03                        |
| Campaign           | CustomObject10.ChildList               | Custom Objects 10                        |
| Campaign           | CustomObject11.ChildList               | Custom Objects 11                        |
| Campaign           | CustomObject12.ChildList               | Custom Objects 12                        |
| Campaign           | CustomObject13.ChildList               | Custom Objects 13                        |
| Campaign           | CustomObject14.ChildList               | Custom Objects 14                        |
| Campaign           | CustomObject15.ChildList               | Custom Objects 15                        |
| Campaign           | CustomObject4.ChildList                | Custom Objects 04                        |
| Campaign           | CustomObject5.ChildList                | Custom Objects 05                        |
| Campaign           | CustomObject6.ChildList                | Custom Objects 06                        |
| Campaign           | CustomObject7.ChildList                | Custom Objects 07                        |
| Campaign           | CustomObject8.ChildList                | Custom Objects 08                        |
| Campaign           | CustomObject9.ChildList                | Custom Objects 09                        |
| Campaign           | FinancialAccount.ChildList             | Financial Accounts                       |
| Campaign           | FinancialPlan.ChildList                | Financial Plans                          |
| Campaign           | LeadChildList                          | Leads                                    |
| Campaign           | MDFRequest.ChildList                   | MDF Requests                             |
| Campaign           | MedEdEvent.ChildList                   | Events                                   |
| Campaign           | OptyChildList                          | Opportunities                            |
| Campaign           | PartnerCampaign.ChildList              | Partner Campaigns                        |
| Campaign           | Policy.ChildList                       | Policies                                 |
| Campaign           | TaskOpenChildList                      | Open Tasks                               |
| Certification      | AccreditationCertification.ChildList   | Accreditation Certifications             |
| Certification      | Certification Book.ChildList           | Books                                    |
| Certification      | CertificationAttachment.ChildList      | Certification Attachments                |
| Certification      | CertificationCourse.ChildList          | Certification Courses                    |
| Certification      | CertificationExam.ChildList            | Certification Exams                      |
| Certification      | CertificationProduct.ChildList         | Certification Products                   |
| Certification      | CertificationProductCategory.ChildList | Certification Product Product Categories |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                     | Child Applet Name       |
|--------------------|-------------------------------------|-------------------------|
| Certification      | CertificationRelationship.ChildList | Related Certifications  |
| Certification      | CertificationRequest.ChildList      | Certification Requests  |
| Certification      | CertificationSolution.ChildList     | Certification Solutions |
| Certification      | CertificationTeam.ChildList         | Certification Teams     |
| Certification      | Custom Object 1.ChildList           | Custom Objects 01       |
| Certification      | Custom Object 2.ChildList           | Custom Objects 02       |
| Certification      | Custom Object 3.ChildList           | Custom Objects 03       |
| Certification      | CustomObject10.ChildList            | Custom Objects 10       |
| Certification      | CustomObject11.ChildList            | Custom Objects 11       |
| Certification      | CustomObject12.ChildList            | Custom Objects 12       |
| Certification      | CustomObject13.ChildList            | Custom Objects 13       |
| Certification      | CustomObject14.ChildList            | Custom Objects 14       |
| Certification      | CustomObject15.ChildList            | Custom Objects 15       |
| Certification      | CustomObject4.ChildList             | Custom Objects 04       |
| Certification      | CustomObject5.ChildList             | Custom Objects 05       |
| Certification      | CustomObject6.ChildList             | Custom Objects 06       |
| Certification      | CustomObject7.ChildList             | Custom Objects 07       |
| Certification      | CustomObject8.ChildList             | Custom Objects 08       |
| Certification      | CustomObject9.ChildList             | Custom Objects 09       |
| Channel Partner    | ActivityClosedChildList             | Completed Activities    |
| Channel Partner    | ActivityOpenChildList               | Open Activities         |
| Channel Partner    | AppointmentOpenChildList            | Open Appointments       |
| Channel Partner    | ChannelPartnerTerritoryChildList    | Territories             |
| Channel Partner    | CustObj1ChildList                   | Custom Objects 01       |
| Channel Partner    | CustObj2ChildList                   | Custom Objects 02       |
| Channel Partner    | CustObj3ChildList                   | Custom Objects 03       |
| Channel Partner    | CustomObject10.ChildList            | Custom Objects 10       |
| Channel Partner    | CustomObject11.ChildList            | Custom Objects 11       |
| Channel Partner    | CustomObject12.ChildList            | Custom Objects 12       |
| Channel Partner    | CustomObject13.ChildList            | Custom Objects 13       |
| Channel Partner    | CustomObject14.ChildList            | Custom Objects 14       |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name    |
|--------------------|---------------------------------|----------------------|
| Channel Partner    | CustomObject15.ChildList        | Custom Objects 15    |
| Channel Partner    | CustomObject4.ChildList         | Custom Objects 04    |
| Channel Partner    | CustomObject5.ChildList         | Custom Objects 05    |
| Channel Partner    | CustomObject6.ChildList         | Custom Objects 06    |
| Channel Partner    | CustomObject7.ChildList         | Custom Objects 07    |
| Channel Partner    | CustomObject8.ChildList         | Custom Objects 08    |
| Channel Partner    | CustomObject9.ChildList         | Custom Objects 09    |
| Channel Partner    | DealerAddress.ChildList         | Addresses            |
| Channel Partner    | DealerBookChildList             | Books                |
| Channel Partner    | DealerContactChildList          | Contacts             |
| Channel Partner    | DealerFACHildList               | Attachments          |
| Channel Partner    | DealerNoteChildList             | Notes                |
| Channel Partner    | DealerSalesHoursChildList       | Sales Hours          |
| Channel Partner    | DealerSalesServiceMakeList      | Makes                |
| Channel Partner    | DealerServiceHoursChildList     | Service Hours        |
| Channel Partner    | DealerVehicleChildList          | Vehicles             |
| Channel Partner    | OptyNoDelChildList              | Opportunities        |
| Channel Partner    | SRChildList                     | Service Requests     |
| Channel Partner    | TaskOpenChildList               | Open Tasks           |
| Claim              | Activity.ChildList              | Activities           |
| Claim              | ActivityClosedChildList         | Completed Activities |
| Claim              | AppointmentOpenChildList        | Open Appointments    |
| Claim              | Damage.ChildList                | Damages              |
| Claim              | InvolvedParty.ChildList         | Involved Parties     |
| Claim              | Service Request.ChildList       | Service Requests     |
| Claim              | TaskOpenChildList               | Open Tasks           |
| CODActChatDetail   | Activity Book.ChildList         | Books                |
| CODActChatDetail   | Audit Trail.ChildList           | Audit Trail          |
| CODActChatDetail   | CODActChatFACHildList           | Attachments          |
| CODActChatDetail   | CODContactChildList             | Contacts             |
| CODActChatDetail   | CRMOD_LS_Transactions.ChildList | Sample Transactions  |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name   |
|--------------------|---------------------------------|---------------------|
| CODActChatDetail   | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses   |
| CODActChatDetail   | CRMODLS_Signature.ChildList     | Signature           |
| CODActChatDetail   | CustomObject10.ChildList        | Custom Objects 10   |
| CODActChatDetail   | CustomObject11.ChildList        | Custom Objects 11   |
| CODActChatDetail   | CustomObject12.ChildList        | Custom Objects 12   |
| CODActChatDetail   | CustomObject13.ChildList        | Custom Objects 13   |
| CODActChatDetail   | CustomObject14.ChildList        | Custom Objects 14   |
| CODActChatDetail   | CustomObject15.ChildList        | Custom Objects 15   |
| CODActChatDetail   | CustomObject4.ChildList         | Custom Objects 04   |
| CODActChatDetail   | CustomObject5.ChildList         | Custom Objects 05   |
| CODActChatDetail   | CustomObject6.ChildList         | Custom Objects 06   |
| CODActChatDetail   | CustomObject7.ChildList         | Custom Objects 07   |
| CODActChatDetail   | CustomObject8.ChildList         | Custom Objects 08   |
| CODActChatDetail   | CustomObject9.ChildList         | Custom Objects 09   |
| CODActChatDetail   | Fund Request.ChildList          | Fund Requests       |
| CODActChatDetail   | Order.ChildList                 | Orders              |
| CODActChatDetail   | SampleRequest.ChildList         | Sample Requests     |
| CODActEmailDetail  | Activity Book.ChildList         | Books               |
| CODActEmailDetail  | Audit Trail.ChildList           | Audit Trail         |
| CODActEmailDetail  | CODActEmailFACHildList          | Attachments         |
| CODActEmailDetail  | CODContactChildList             | Contacts            |
| CODActEmailDetail  | CRMOD_LS_Transactions.ChildList | Sample Transactions |
| CODActEmailDetail  | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses   |
| CODActEmailDetail  | CRMODLS_Signature.ChildList     | Signature           |
| CODActEmailDetail  | CustomObject10.ChildList        | Custom Objects 10   |
| CODActEmailDetail  | CustomObject11.ChildList        | Custom Objects 11   |
| CODActEmailDetail  | CustomObject12.ChildList        | Custom Objects 12   |
| CODActEmailDetail  | CustomObject13.ChildList        | Custom Objects 13   |
| CODActEmailDetail  | CustomObject14.ChildList        | Custom Objects 14   |
| CODActEmailDetail  | CustomObject15.ChildList        | Custom Objects 15   |
| CODActEmailDetail  | CustomObject4.ChildList         | Custom Objects 04   |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name   |
|--------------------|---------------------------------|---------------------|
| CODActEmailDetail  | CustomObject5.ChildList         | Custom Objects 05   |
| CODActEmailDetail  | CustomObject6.ChildList         | Custom Objects 06   |
| CODActEmailDetail  | CustomObject7.ChildList         | Custom Objects 07   |
| CODActEmailDetail  | CustomObject8.ChildList         | Custom Objects 08   |
| CODActEmailDetail  | CustomObject9.ChildList         | Custom Objects 09   |
| CODActEmailDetail  | Fund Request.ChildList          | Fund Requests       |
| CODActEmailDetail  | Order.ChildList                 | Orders              |
| CODActEmailDetail  | SampleRequest.ChildList         | Sample Requests     |
| CODActVMDetail     | Activity Book.ChildList         | Books               |
| CODActVMDetail     | Audit Trail.ChildList           | Audit Trail         |
| CODActVMDetail     | CODActVMFACHildList             | Attachments         |
| CODActVMDetail     | CODContactChildList             | Contacts            |
| CODActVMDetail     | CRMOD_LS_Transactions.ChildList | Sample Transactions |
| CODActVMDetail     | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses   |
| CODActVMDetail     | CRMODLS_Signature.ChildList     | Signature           |
| CODActVMDetail     | CustomObject10.ChildList        | Custom Objects 10   |
| CODActVMDetail     | CustomObject11.ChildList        | Custom Objects 11   |
| CODActVMDetail     | CustomObject12.ChildList        | Custom Objects 12   |
| CODActVMDetail     | CustomObject13.ChildList        | Custom Objects 13   |
| CODActVMDetail     | CustomObject14.ChildList        | Custom Objects 14   |
| CODActVMDetail     | CustomObject15.ChildList        | Custom Objects 15   |
| CODActVMDetail     | CustomObject4.ChildList         | Custom Objects 04   |
| CODActVMDetail     | CustomObject5.ChildList         | Custom Objects 05   |
| CODActVMDetail     | CustomObject6.ChildList         | Custom Objects 06   |
| CODActVMDetail     | CustomObject7.ChildList         | Custom Objects 07   |
| CODActVMDetail     | CustomObject8.ChildList         | Custom Objects 08   |
| CODActVMDetail     | CustomObject9.ChildList         | Custom Objects 09   |
| CODActVMDetail     | Fund Request.ChildList          | Fund Requests       |
| CODActVMDetail     | Order.ChildList                 | Orders              |
| CODActVMDetail     | SampleRequest.ChildList         | Sample Requests     |
| CODActVoiceDetail  | Activity Book.ChildList         | Books               |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name   |
|--------------------|---------------------------------|---------------------|
| CODActVoiceDetail  | Audit Trail.ChildList           | Audit Trail         |
| CODActVoiceDetail  | CODActVoiceFACHildList          | Attachments         |
| CODActVoiceDetail  | CODContactChildList             | Contacts            |
| CODActVoiceDetail  | CRMOD_LS_Transactions.ChildList | Sample Transactions |
| CODActVoiceDetail  | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses   |
| CODActVoiceDetail  | CRMODLS_Signature.ChildList     | Signature           |
| CODActVoiceDetail  | CustomObject10.ChildList        | Custom Objects 10   |
| CODActVoiceDetail  | CustomObject11.ChildList        | Custom Objects 11   |
| CODActVoiceDetail  | CustomObject12.ChildList        | Custom Objects 12   |
| CODActVoiceDetail  | CustomObject13.ChildList        | Custom Objects 13   |
| CODActVoiceDetail  | CustomObject14.ChildList        | Custom Objects 14   |
| CODActVoiceDetail  | CustomObject15.ChildList        | Custom Objects 15   |
| CODActVoiceDetail  | CustomObject4.ChildList         | Custom Objects 04   |
| CODActVoiceDetail  | CustomObject5.ChildList         | Custom Objects 05   |
| CODActVoiceDetail  | CustomObject6.ChildList         | Custom Objects 06   |
| CODActVoiceDetail  | CustomObject7.ChildList         | Custom Objects 07   |
| CODActVoiceDetail  | CustomObject8.ChildList         | Custom Objects 08   |
| CODActVoiceDetail  | CustomObject9.ChildList         | Custom Objects 09   |
| CODActVoiceDetail  | Fund Request.ChildList          | Fund Requests       |
| CODActVoiceDetail  | Order.ChildList                 | Orders              |
| CODActVoiceDetail  | SampleRequest.ChildList         | Sample Requests     |
| CODWrapUp          | Activity Book.ChildList         | Books               |
| CODWrapUp          | Audit Trail.ChildList           | Audit Trail         |
| CODWrapUp          | CRMOD_LS_Transactions.ChildList | Sample Transactions |
| CODWrapUp          | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses   |
| CODWrapUp          | CRMODLS_Signature.ChildList     | Signature           |
| CODWrapUp          | CustomObject10.ChildList        | Custom Objects 10   |
| CODWrapUp          | CustomObject11.ChildList        | Custom Objects 11   |
| CODWrapUp          | CustomObject12.ChildList        | Custom Objects 12   |
| CODWrapUp          | CustomObject13.ChildList        | Custom Objects 13   |
| CODWrapUp          | CustomObject14.ChildList        | Custom Objects 14   |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                | Child Applet Name             |
|--------------------|--------------------------------|-------------------------------|
| CODWrapUp          | CustomObject15.ChildList       | Custom Objects 15             |
| CODWrapUp          | CustomObject4.ChildList        | Custom Objects 04             |
| CODWrapUp          | CustomObject5.ChildList        | Custom Objects 05             |
| CODWrapUp          | CustomObject6.ChildList        | Custom Objects 06             |
| CODWrapUp          | CustomObject7.ChildList        | Custom Objects 07             |
| CODWrapUp          | CustomObject8.ChildList        | Custom Objects 08             |
| CODWrapUp          | CustomObject9.ChildList        | Custom Objects 09             |
| CODWrapUp          | Fund Request.ChildList         | Fund Requests                 |
| CODWrapUp          | Order.ChildList                | Orders                        |
| CODWrapUp          | SampleRequest.ChildList        | Sample Requests               |
| Contact            | Accreditation.ChildList        | Accreditations                |
| Contact            | ActivityClosedChildList        | Completed Activities          |
| Contact            | ActivityOpenChildList          | Open Activities               |
| Contact            | AppointmentOpenChildList       | Open Appointments             |
| Contact            | Audit Trail.ChildList          | Audit Trail                   |
| Contact            | BlockedProduct.ChildList       | Blocked Products              |
| Contact            | CallActivityHistory.ChildList  | Call Activity History         |
| Contact            | Certification.ChildList        | Certifications                |
| Contact            | CertificationRequest.ChildList | Certification Requests        |
| Contact            | Claim.ChildList                | Claims                        |
| Contact            | ContactAccountChildList        | Accounts                      |
| Contact            | ContactAddressChildList        | Addresses                     |
| Contact            | ContactAssetChild              | Assets                        |
| Contact            | ContactBestTimes.ChildList     | Contact Best Times            |
| Contact            | ContactBookChildList           | Books                         |
| Contact            | ContactCallChildList           | Calls                         |
| Contact            | ContactCampChildList           | Campaigns                     |
| Contact            | ContactCustSatSurveyChildList  | Customer Satisfaction Surveys |
| Contact            | ContactFACHildList             | Attachments                   |
| Contact            | ContactHouseholdChildList      | Household                     |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                    | Child Applet Name      |
|--------------------|------------------------------------|------------------------|
| Contact            | ContactInterestChildList           | Contact Interests      |
| Contact            | ContactNoteChildList               | Notes                  |
| Contact            | ContactPortfolioChildList          | Portfolio              |
| Contact            | ContactRelationshipList            | Contact Relationships  |
| Contact            | ContactTeamChildList               | Contact Team           |
| Contact            | Course.ChildList                   | Courses                |
| Contact            | CourseEnrollment.ChildList         | Course Enrollments     |
| Contact            | Coverage.ChildList                 | Coverages              |
| Contact            | CRMOD_LS_ContactLicenses.ChildList | Contact State Licenses |
| Contact            | CRMOD_LS_Transactions.ChildList    | Sample Transactions    |
| Contact            | CRMODLS_BPL_CNTCT.ChildList        | Plan Contacts          |
| Contact            | CRMODLS_OBJECTIVE.ChildList        | Objectives             |
| Contact            | CRMODLS_Signature.ChildList        | Signature              |
| Contact            | CustObj1ChildList                  | Custom Objects 01      |
| Contact            | CustObj2ChildList                  | Custom Objects 02      |
| Contact            | CustObj3ChildList                  | Custom Objects 03      |
| Contact            | CustomObject10.ChildList           | Custom Objects 10      |
| Contact            | CustomObject11.ChildList           | Custom Objects 11      |
| Contact            | CustomObject12.ChildList           | Custom Objects 12      |
| Contact            | CustomObject13.ChildList           | Custom Objects 13      |
| Contact            | CustomObject14.ChildList           | Custom Objects 14      |
| Contact            | CustomObject15.ChildList           | Custom Objects 15      |
| Contact            | CustomObject4.ChildList            | Custom Objects 04      |
| Contact            | CustomObject5.ChildList            | Custom Objects 05      |
| Contact            | CustomObject6.ChildList            | Custom Objects 06      |
| Contact            | CustomObject7.ChildList            | Custom Objects 07      |
| Contact            | CustomObject8.ChildList            | Custom Objects 08      |
| Contact            | CustomObject9.ChildList            | Custom Objects 09      |
| Contact            | DealerVehicleChildList             | Vehicles               |
| Contact            | DealRegistration.ChildList         | Deal Registrations     |
| Contact            | Exam.ChildList                     | Exams                  |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                           | Child Applet Name                 |
|--------------------|---|-----------------------------------|
| Contact            | ExamRegistration.ChildList                | Exam Registrations                |
| Contact            | FinancialAccount.Account_Holder.ChildList | Financial Account: Account Holder |
| Contact            | FinancialAccount.ChildList                | Financial Accounts                |
| Contact            | FinancialAccountHolder.ChildList          | Financial Account Holders         |
| Contact            | FinancialPlan.ChildList                   | Financial Plans                   |
| Contact            | HCPContactAllocation.ChildList            | HCP Contact Allocations           |
| Contact            | InvolvedParty.ChildList                   | Involved Parties                  |
| Contact            | LeadChildList                             | Leads                             |
| Contact            | MedEdChildList                            | Event                             |
| Contact            | OptyContactChildList                      | Opportunities                     |
| Contact            | Order.ChildList                           | Orders                            |
| Contact            | Policy.Carrier_Underwriter.ChildList      | Policy: Carrier Underwriter       |
| Contact            | Policy.ChildList                          | Policies                          |
| Contact            | PolicyHolder.ChildList                    | Policy Holders                    |
| Contact            | ReferralChildList                         | Referrals                         |
| Contact            | RevenueChildList                          | Revenues                          |
| Contact            | SampleRequest.ChildList                   | Sample Requests                   |
| Contact            | SocialProfile.ChildList                   | Social Profiles                   |
| Contact            | SRChildList                               | Service Requests                  |
| Contact            | TaskOpenChildList                         | Open Tasks                        |
| Contact Call       | ActionContactChildList                    | Contacts                          |
| Contact Call       | ActionFACHildList                         | Attachments                       |
| Contact Call       | ActionUserChildList                       | Users                             |
| Contact Call       | Activity Book.ChildList                   | Books                             |
| Contact Call       | ActivityAssessmentChildList               | Activity Assessments              |
| Contact Call       | Audit Trail.ChildList                     | Audit Trail                       |
| Contact Call       | CallsMessagePlanVBCChildList              | Available Message Plans           |
| Contact Call       | CallsProdDetailChildList                  | Products Detailed                 |
| Contact Call       | CallsProdDetailVBCChildList               | Available Products for Detailing  |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name                    |
|--------------------|---------------------------------|--------------------------------------|
| Contact Call       | CallsPromItemDropChildList      | Promotional Items                    |
| Contact Call       | CallsPromItemDropVBCChildList   | Available Promotional Items for Drop |
| Contact Call       | CallsSampDropChildList          | Samples Dropped                      |
| Contact Call       | CallsSampDropVBCChildList       | Available Samples for Drop           |
| Contact Call       | ContactBestTimes.ChildList      | Contact Best Times                   |
| Contact Call       | CRMOD_LS_Transactions.ChildList | Sample Transactions                  |
| Contact Call       | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses                    |
| Contact Call       | CRMODLS_Signature.ChildList     | Signature                            |
| Contact Call       | CustObj1ChildList               | Custom Objects 01                    |
| Contact Call       | CustObj2ChildList               | Custom Objects 02                    |
| Contact Call       | CustObj3ChildList               | Custom Objects 03                    |
| Contact Call       | CustomObject10.ChildList        | Custom Objects 10                    |
| Contact Call       | CustomObject11.ChildList        | Custom Objects 11                    |
| Contact Call       | CustomObject12.ChildList        | Custom Objects 12                    |
| Contact Call       | CustomObject13.ChildList        | Custom Objects 13                    |
| Contact Call       | CustomObject14.ChildList        | Custom Objects 14                    |
| Contact Call       | CustomObject15.ChildList        | Custom Objects 15                    |
| Contact Call       | CustomObject4.ChildList         | Custom Objects 04                    |
| Contact Call       | CustomObject5.ChildList         | Custom Objects 05                    |
| Contact Call       | CustomObject6.ChildList         | Custom Objects 06                    |
| Contact Call       | CustomObject7.ChildList         | Custom Objects 07                    |
| Contact Call       | CustomObject8.ChildList         | Custom Objects 08                    |
| Contact Call       | CustomObject9.ChildList         | Custom Objects 09                    |
| Contact Call       | Fund Request.ChildList          | Fund Requests                        |
| Contact Call       | MedEdSolutionChildList          | Solutions                            |
| Contact Call       | Order.ChildList                 | Orders                               |
| Contact Call       | SampleRequest.ChildList         | Sample Requests                      |
| Course             | CertificationCourse.ChildList   | Certification Courses                |
| Course             | Course Book.ChildList           | Books                                |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name     | Child Applet Id                       | Child Applet Name                 |
|------------------------|---------------------------------------|-----------------------------------|
| Course                 | CourseAttachment.ChildList            | Course Attachments                |
| Course                 | CourseCategory.ChildList              | Course Product Product Categories |
| Course                 | CourseEnrollment.ChildList            | Course Enrollments                |
| Course                 | CourseExam.ChildList                  | Course Exams                      |
| Course                 | CoursePartner.ChildList               | Course Partners                   |
| Course                 | CourseProduct.ChildList               | Course Products                   |
| Course                 | CourseRelationship.ChildList          | Related Courses                   |
| Course                 | CourseSolution.ChildList              | Course Solutions                  |
| Course                 | CourseTeam.ChildList                  | Course Teams                      |
| Course                 | Custom Object 1.ChildList             | Custom Objects 01                 |
| Course                 | Custom Object 2.ChildList             | Custom Objects 02                 |
| Course                 | Custom Object 3.ChildList             | Custom Objects 03                 |
| Course                 | CustomObject10.ChildList              | Custom Objects 10                 |
| Course                 | CustomObject11.ChildList              | Custom Objects 11                 |
| Course                 | CustomObject12.ChildList              | Custom Objects 12                 |
| Course                 | CustomObject13.ChildList              | Custom Objects 13                 |
| Course                 | CustomObject14.ChildList              | Custom Objects 14                 |
| Course                 | CustomObject15.ChildList              | Custom Objects 15                 |
| Course                 | CustomObject4.ChildList               | Custom Objects 04                 |
| Course                 | CustomObject5.ChildList               | Custom Objects 05                 |
| Course                 | CustomObject6.ChildList               | Custom Objects 06                 |
| Course                 | CustomObject7.ChildList               | Custom Objects 07                 |
| Course                 | CustomObject8.ChildList               | Custom Objects 08                 |
| Course                 | CustomObject9.ChildList               | Custom Objects 09                 |
| CRMOD_LS_Allocation    | Audit Trail.ChildList                 | Audit Trail                       |
| CRMOD_LS_Allocation    | CRMOD_LS_Allocation Book.ChildList    | Books                             |
| CRMOD_LS_MessagingPlan | CRMOD_LS_MessagingPlan Book.ChildList | Books                             |
| CRMOD_LS_MessagingPlan | CRMOD_LS_MsgPlanItem.ChildList        | Messaging Plan Items              |
| CRMOD_LS_MessagingPlan | CRMODLS_BusinessPlan.ChildList        | Business Plans                    |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name     | Child Applet Id                      | Child Applet Name                        |
|------------------------|--------------------------------------|--|
| CRMOD_LS_MessagingPlan | CRMODLS_PCD_MSGRSP.ChildList         | Message Responses                        |
| CRMOD_LS_MessagingPlan | Custom Object 1.ChildList            | Custom Objects 01                        |
| CRMOD_LS_MessagingPlan | Custom Object 2.ChildList            | Custom Objects 02                        |
| CRMOD_LS_MessagingPlan | Custom Object 3.ChildList            | Custom Objects 03                        |
| CRMOD_LS_MessagingPlan | CustomObject10.ChildList             | Custom Objects 10                        |
| CRMOD_LS_MessagingPlan | CustomObject11.ChildList             | Custom Objects 11                        |
| CRMOD_LS_MessagingPlan | CustomObject12.ChildList             | Custom Objects 12                        |
| CRMOD_LS_MessagingPlan | CustomObject13.ChildList             | Custom Objects 13                        |
| CRMOD_LS_MessagingPlan | CustomObject14.ChildList             | Custom Objects 14                        |
| CRMOD_LS_MessagingPlan | CustomObject15.ChildList             | Custom Objects 15                        |
| CRMOD_LS_MessagingPlan | CustomObject4.ChildList              | Custom Objects 04                        |
| CRMOD_LS_MessagingPlan | CustomObject5.ChildList              | Custom Objects 05                        |
| CRMOD_LS_MessagingPlan | CustomObject6.ChildList              | Custom Objects 06                        |
| CRMOD_LS_MessagingPlan | CustomObject7.ChildList              | Custom Objects 07                        |
| CRMOD_LS_MessagingPlan | CustomObject8.ChildList              | Custom Objects 08                        |
| CRMOD_LS_MessagingPlan | CustomObject9.ChildList              | Custom Objects 09                        |
| CRMOD_LS_MsgPlanItem   | CallProdDetail_MsgPlanItem.ChildList | Call Product Detail Messaging Plan Items |
| CRMOD_LS_MsgPlanItem   | CRMOD_LS_MsgPlnRel.ChildList         | Messaging Plan Item Relations            |
| CRMOD_LS_MsgPlanItem   | CRMODLS_PCD_MSGRSP.ChildList         | Message Responses                        |
| CRMOD_LS_MsgPlanItem   | Custom Object 1.ChildList            | Custom Objects 01                        |
| CRMOD_LS_MsgPlanItem   | Custom Object 2.ChildList            | Custom Objects 02                        |
| CRMOD_LS_MsgPlanItem   | Custom Object 3.ChildList            | Custom Objects 03                        |
| CRMOD_LS_MsgPlanItem   | CustomObject10.ChildList             | Custom Objects 10                        |
| CRMOD_LS_MsgPlanItem   | CustomObject11.ChildList             | Custom Objects 11                        |
| CRMOD_LS_MsgPlanItem   | CustomObject12.ChildList             | Custom Objects 12                        |
| CRMOD_LS_MsgPlanItem   | CustomObject13.ChildList             | Custom Objects 13                        |
| CRMOD_LS_MsgPlanItem   | CustomObject14.ChildList             | Custom Objects 14                        |
| CRMOD_LS_MsgPlanItem   | CustomObject15.ChildList             | Custom Objects 15                        |
| CRMOD_LS_MsgPlanItem   | CustomObject4.ChildList              | Custom Objects 04                        |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name    | Child Applet Id                      | Child Applet Name                                       |
|-----------------------|--------------------------------------|---|
| CRMOD_LS_MsgPlanItem  | CustomObject5.ChildList              | Custom Objects 05                                       |
| CRMOD_LS_MsgPlanItem  | CustomObject6.ChildList              | Custom Objects 06                                       |
| CRMOD_LS_MsgPlanItem  | CustomObject7.ChildList              | Custom Objects 07                                       |
| CRMOD_LS_MsgPlanItem  | CustomObject8.ChildList              | Custom Objects 08                                       |
| CRMOD_LS_MsgPlanItem  | CustomObject9.ChildList              | Custom Objects 09                                       |
| CRMOD_LS_MsgPlnRel    | CallProdDetail_MsgPlnRel.ChildList   | Call Product Detail<br>Messaging Plan Item<br>Relations |
| CRMOD_LS_MsgPlnRel    | Custom Object 1.ChildList            | Custom Objects 01                                       |
| CRMOD_LS_MsgPlnRel    | Custom Object 2.ChildList            | Custom Objects 02                                       |
| CRMOD_LS_MsgPlnRel    | Custom Object 3.ChildList            | Custom Objects 03                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject10.ChildList             | Custom Objects 10                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject11.ChildList             | Custom Objects 11                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject12.ChildList             | Custom Objects 12                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject13.ChildList             | Custom Objects 13                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject14.ChildList             | Custom Objects 14                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject15.ChildList             | Custom Objects 15                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject4.ChildList              | Custom Objects 04                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject5.ChildList              | Custom Objects 05                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject6.ChildList              | Custom Objects 06                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject7.ChildList              | Custom Objects 07                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject8.ChildList              | Custom Objects 08                                       |
| CRMOD_LS_MsgPlnRel    | CustomObject9.ChildList              | Custom Objects 09                                       |
| CRMOD_LS_Transactions | CRMOD_LS_TransactionItems.ChildList  | Transaction Items                                       |
| CRMOD_LS_Transactions | CRMOD_LS_Transactions Book.ChildList | Books   |
| CRMOD_LS_Transactions | Custom Object 1.ChildList            | Custom Objects 01                                       |
| CRMOD_LS_Transactions | Custom Object 2.ChildList            | Custom Objects 02                                       |
| CRMOD_LS_Transactions | Custom Object 3.ChildList            | Custom Objects 03                                       |
| CRMOD_LS_Transactions | CustomObject10.ChildList             | Custom Objects 10                                       |
| CRMOD_LS_Transactions | CustomObject11.ChildList             | Custom Objects 11                                       |
| CRMOD_LS_Transactions | CustomObject12.ChildList             | Custom Objects 12                                       |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name    | Child Applet Id                           | Child Applet Name         |
|-----------------------|---|---------------------------|
| CRMOD_LS_Transactions | CustomObject13.ChildList                  | Custom Objects 13         |
| CRMOD_LS_Transactions | CustomObject14.ChildList                  | Custom Objects 14         |
| CRMOD_LS_Transactions | CustomObject15.ChildList                  | Custom Objects 15         |
| CRMOD_LS_Transactions | CustomObject4.ChildList                   | Custom Objects 04         |
| CRMOD_LS_Transactions | CustomObject5.ChildList                   | Custom Objects 05         |
| CRMOD_LS_Transactions | CustomObject6.ChildList                   | Custom Objects 06         |
| CRMOD_LS_Transactions | CustomObject7.ChildList                   | Custom Objects 07         |
| CRMOD_LS_Transactions | CustomObject8.ChildList                   | Custom Objects 08         |
| CRMOD_LS_Transactions | CustomObject9.ChildList                   | Custom Objects 09         |
| CRMODLS_BusinessPlan  | AccreditationRequest.ChildList            | Accreditation Requests    |
| CRMODLS_BusinessPlan  | Activity.ChildList                        | Activities                |
| CRMODLS_BusinessPlan  | ActivityClosedChildList                   | Completed Activities      |
| CRMODLS_BusinessPlan  | AppointmentOpenChildList                  | Open Appointments         |
| CRMODLS_BusinessPlan  | Audit Trail.ChildList                     | Audit Trail               |
| CRMODLS_BusinessPlan  | BusinessPlanAssessmentChildList           | Business Plan Assessment  |
| CRMODLS_BusinessPlan  | CertificationRequest.ChildList            | Certification Requests    |
| CRMODLS_BusinessPlan  | CRMOD_LS_MessagingPlan.ChildList          | Messaging Plans           |
| CRMODLS_BusinessPlan  | CRMODLS_BPL_ACNT.ChildList                | Plan Accounts             |
| CRMODLS_BusinessPlan  | CRMODLS_BPL_CNTCT.ChildList               | Plan Contacts             |
| CRMODLS_BusinessPlan  | CRMODLS_BusinessPlan Book.ChildList       | Books                     |
| CRMODLS_BusinessPlan  | CRMODLS_BusinessPlan.SelfChildList        | Business Plans            |
| CRMODLS_BusinessPlan  | CRMODLS_BusinessPlan_ATTACHMENT.ChildList | Business Plan Attachments |
| CRMODLS_BusinessPlan  | CRMODLS_BusinessPlanTeam.ChildList        | Business Plan Teams       |
| CRMODLS_BusinessPlan  | CRMODLS_OBJECTIVE.ChildList               | Objectives                |
| CRMODLS_BusinessPlan  | CRMODLS_PlanOpportunities.ChildList       | Plan Opportunities        |
| CRMODLS_BusinessPlan  | Custom Object 1.ChildList                 | Custom Objects 01         |
| CRMODLS_BusinessPlan  | Custom Object 2.ChildList                 | Custom Objects 02         |
| CRMODLS_BusinessPlan  | Custom Object 3.ChildList                 | Custom Objects 03         |
| CRMODLS_BusinessPlan  | CustomObject10.ChildList                  | Custom Objects 10         |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name           | Child Applet Id                            | Child Applet Name       |
|------------------------------|--|-------------------------|
| CRMODLS_BusinessPlan         | CustomObject11.ChildList                   | Custom Objects 11       |
| CRMODLS_BusinessPlan         | CustomObject12.ChildList                   | Custom Objects 12       |
| CRMODLS_BusinessPlan         | CustomObject13.ChildList                   | Custom Objects 13       |
| CRMODLS_BusinessPlan         | CustomObject14.ChildList                   | Custom Objects 14       |
| CRMODLS_BusinessPlan         | CustomObject15.ChildList                   | Custom Objects 15       |
| CRMODLS_BusinessPlan         | CustomObject4.ChildList                    | Custom Objects 04       |
| CRMODLS_BusinessPlan         | CustomObject5.ChildList                    | Custom Objects 05       |
| CRMODLS_BusinessPlan         | CustomObject6.ChildList                    | Custom Objects 06       |
| CRMODLS_BusinessPlan         | CustomObject7.ChildList                    | Custom Objects 07       |
| CRMODLS_BusinessPlan         | CustomObject8.ChildList                    | Custom Objects 08       |
| CRMODLS_BusinessPlan         | CustomObject9.ChildList                    | Custom Objects 09       |
| CRMODLS_BusinessPlan         | MedEdEvent.ChildList                       | Events                  |
| CRMODLS_BusinessPlan         | PartnerPlan.ChildList                      | Partner Plans           |
| CRMODLS_BusinessPlan         | TaskOpenChildList                          | Open Tasks              |
| CRMODLS_InventoryAuditReport | CRMODLS_InventoryAuditReportBook.ChildList | Books                   |
| CRMODLS_InventoryAuditReport | CRMODLS_SampleInventory.ChildList          | Sample Inventory        |
| CRMODLS_InventoryPeriod      | CRMOD_LS_Transactions.ChildList            | Sample Transactions     |
| CRMODLS_InventoryPeriod      | CRMODLS_InventoryAuditReport.ChildList     | Inventory Audit Reports |
| CRMODLS_InventoryPeriod      | CRMODLS_InventoryPeriodBook.ChildList      | Books                   |
| CRMODLS_InventoryPeriod      | CRMODLS_SampleInventory.ChildList          | Sample Inventory        |
| CRMODLS_InventoryPeriod      | Custom Object 1.ChildList                  | Custom Objects 01       |
| CRMODLS_InventoryPeriod      | Custom Object 2.ChildList                  | Custom Objects 02       |
| CRMODLS_InventoryPeriod      | Custom Object 3.ChildList                  | Custom Objects 03       |
| CRMODLS_InventoryPeriod      | CustomObject10.ChildList                   | Custom Objects 10       |
| CRMODLS_InventoryPeriod      | CustomObject11.ChildList                   | Custom Objects 11       |
| CRMODLS_InventoryPeriod      | CustomObject12.ChildList                   | Custom Objects 12       |
| CRMODLS_InventoryPeriod      | CustomObject13.ChildList                   | Custom Objects 13       |
| CRMODLS_InventoryPeriod      | CustomObject14.ChildList                   | Custom Objects 14       |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name      | Child Applet Id                            | Child Applet Name      |
|-------------------------|--|------------------------|
| CRMODLS_InventoryPeriod | CustomObject15.ChildList                   | Custom Objects 15      |
| CRMODLS_InventoryPeriod | CustomObject4.ChildList                    | Custom Objects 04      |
| CRMODLS_InventoryPeriod | CustomObject5.ChildList                    | Custom Objects 05      |
| CRMODLS_InventoryPeriod | CustomObject6.ChildList                    | Custom Objects 06      |
| CRMODLS_InventoryPeriod | CustomObject7.ChildList                    | Custom Objects 07      |
| CRMODLS_InventoryPeriod | CustomObject8.ChildList                    | Custom Objects 08      |
| CRMODLS_InventoryPeriod | CustomObject9.ChildList                    | Custom Objects 09      |
| CRMODLS_OBJECTIVE       | Accreditation.ChildList                    | Accreditations         |
| CRMODLS_OBJECTIVE       | AccreditationRequest.ChildList             | Accreditation Requests |
| CRMODLS_OBJECTIVE       | Activity.ChildList                         | Activities             |
| CRMODLS_OBJECTIVE       | ActivityClosedChildList                    | Completed Activities   |
| CRMODLS_OBJECTIVE       | AppointmentOpenChildList                   | Open Appointments      |
| CRMODLS_OBJECTIVE       | Audit Trail.ChildList                      | Audit Trail            |
| CRMODLS_OBJECTIVE       | Certification.ChildList                    | Certifications         |
| CRMODLS_OBJECTIVE       | CertificationRequest.ChildList             | Certification Requests |
| CRMODLS_OBJECTIVE       | Course.ChildList                           | Courses                |
| CRMODLS_OBJECTIVE       | CourseEnrollment.ChildList                 | Course Enrollments     |
| CRMODLS_OBJECTIVE       | CRMOD_LS_MessagingPlan.ChildList           | Messaging Plans        |
| CRMODLS_OBJECTIVE       | CRMODLS_OBJECTIVE Book.ChildList           | Books                  |
| CRMODLS_OBJECTIVE       | CRMODLS_OBJECTIVE.SelfChildList            | Objectives             |
| CRMODLS_OBJECTIVE       | CRMODLS_OBJECTIVE_ATTACHMENT.C<br>hildList | Objective Attachments  |
| CRMODLS_OBJECTIVE       | CRMODLS_OBJECTIVETeam.ChildList            | Objective Teams        |
| CRMODLS_OBJECTIVE       | Custom Object 1.ChildList                  | Custom Objects 01      |
| CRMODLS_OBJECTIVE       | Custom Object 2.ChildList                  | Custom Objects 02      |
| CRMODLS_OBJECTIVE       | Custom Object 3.ChildList                  | Custom Objects 03      |
| CRMODLS_OBJECTIVE       | CustomObject10.ChildList                   | Custom Objects 10      |
| CRMODLS_OBJECTIVE       | CustomObject11.ChildList                   | Custom Objects 11      |
| CRMODLS_OBJECTIVE       | CustomObject12.ChildList                   | Custom Objects 12      |
| CRMODLS_OBJECTIVE       | CustomObject13.ChildList                   | Custom Objects 13      |
| CRMODLS_OBJECTIVE       | CustomObject14.ChildList                   | Custom Objects 14      |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name                     |
|--------------------|---------------------------------|---------------------------------------|
| CRMODLS_OBJECTIVE  | CustomObject15.ChildList        | Custom Objects 15                     |
| CRMODLS_OBJECTIVE  | CustomObject4.ChildList         | Custom Objects 04                     |
| CRMODLS_OBJECTIVE  | CustomObject5.ChildList         | Custom Objects 05                     |
| CRMODLS_OBJECTIVE  | CustomObject6.ChildList         | Custom Objects 06                     |
| CRMODLS_OBJECTIVE  | CustomObject7.ChildList         | Custom Objects 07                     |
| CRMODLS_OBJECTIVE  | CustomObject8.ChildList         | Custom Objects 08                     |
| CRMODLS_OBJECTIVE  | CustomObject9.ChildList         | Custom Objects 09                     |
| CRMODLS_OBJECTIVE  | DealRegistration.ChildList      | Deal Registrations                    |
| CRMODLS_OBJECTIVE  | Exam.ChildList                  | Exams                                 |
| CRMODLS_OBJECTIVE  | ExamRegistration.ChildList      | Exam Registrations                    |
| CRMODLS_OBJECTIVE  | Fund.ChildList                  | Funds                                 |
| CRMODLS_OBJECTIVE  | Lead.ChildList                  | Leads                                 |
| CRMODLS_OBJECTIVE  | MDFRequest.ChildList            | MDF Requests                          |
| CRMODLS_OBJECTIVE  | MedEdEvent.ChildList            | Events                                |
| CRMODLS_OBJECTIVE  | ObjectiveAssessmentChildList    | Objective Assessment                  |
| CRMODLS_OBJECTIVE  | Opportunity.ChildList           | Opportunities                         |
| CRMODLS_OBJECTIVE  | Service Request.ChildList       | Service Requests                      |
| CRMODLS_OBJECTIVE  | SPRequest.ChildList             | Special Pricing Requests              |
| CRMODLS_OBJECTIVE  | TaskOpenChildList               | Open Tasks                            |
| CRMODLS_PCD_MSGRSP | CallProdDetail_MsgRsp.ChildList | Call Product Detail Message Responses |
| CRMODLS_PCD_MSGRSP | Custom Object 1.ChildList       | Custom Objects 01                     |
| CRMODLS_PCD_MSGRSP | Custom Object 2.ChildList       | Custom Objects 02                     |
| CRMODLS_PCD_MSGRSP | Custom Object 3.ChildList       | Custom Objects 03                     |
| CRMODLS_PCD_MSGRSP | CustomObject10.ChildList        | Custom Objects 10                     |
| CRMODLS_PCD_MSGRSP | CustomObject11.ChildList        | Custom Objects 11                     |
| CRMODLS_PCD_MSGRSP | CustomObject12.ChildList        | Custom Objects 12                     |
| CRMODLS_PCD_MSGRSP | CustomObject13.ChildList        | Custom Objects 13                     |
| CRMODLS_PCD_MSGRSP | CustomObject14.ChildList        | Custom Objects 14                     |
| CRMODLS_PCD_MSGRSP | CustomObject15.ChildList        | Custom Objects 15                     |
| CRMODLS_PCD_MSGRSP | CustomObject4.ChildList         | Custom Objects 04                     |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                  | Child Applet Name    |
|--------------------|----------------------------------|----------------------|
| CRMODLS_PCD_MSGRSP | CustomObject5.ChildList          | Custom Objects 05    |
| CRMODLS_PCD_MSGRSP | CustomObject6.ChildList          | Custom Objects 06    |
| CRMODLS_PCD_MSGRSP | CustomObject7.ChildList          | Custom Objects 07    |
| CRMODLS_PCD_MSGRSP | CustomObject8.ChildList          | Custom Objects 08    |
| CRMODLS_PCD_MSGRSP | CustomObject9.ChildList          | Custom Objects 09    |
| CRMODLS_SampleLot  | CRMODLS_SampleLot Book.ChildList | Books                |
| CRMODLS_SampleLot  | Custom Object 1.ChildList        | Custom Objects 01    |
| CRMODLS_SampleLot  | Custom Object 2.ChildList        | Custom Objects 02    |
| CRMODLS_SampleLot  | Custom Object 3.ChildList        | Custom Objects 03    |
| CRMODLS_SampleLot  | CustomObject10.ChildList         | Custom Objects 10    |
| CRMODLS_SampleLot  | CustomObject11.ChildList         | Custom Objects 11    |
| CRMODLS_SampleLot  | CustomObject12.ChildList         | Custom Objects 12    |
| CRMODLS_SampleLot  | CustomObject13.ChildList         | Custom Objects 13    |
| CRMODLS_SampleLot  | CustomObject14.ChildList         | Custom Objects 14    |
| CRMODLS_SampleLot  | CustomObject15.ChildList         | Custom Objects 15    |
| CRMODLS_SampleLot  | CustomObject4.ChildList          | Custom Objects 04    |
| CRMODLS_SampleLot  | CustomObject5.ChildList          | Custom Objects 05    |
| CRMODLS_SampleLot  | CustomObject6.ChildList          | Custom Objects 06    |
| CRMODLS_SampleLot  | CustomObject7.ChildList          | Custom Objects 07    |
| CRMODLS_SampleLot  | CustomObject8.ChildList          | Custom Objects 08    |
| CRMODLS_SampleLot  | CustomObject9.ChildList          | Custom Objects 09    |
| CRMODLS_Signature  | Audit Trail.ChildList            | Audit Trail          |
| CRMODLS_SIGNDISC   | CRMODLS_RELDISC.ChildList        | Related Disclaimers  |
| Custom Object 1    | Accreditation.ChildList          | Accreditations       |
| Custom Object 1    | ActivityClosedChildList          | Completed Activities |
| Custom Object 1    | ActivityOpenChildList            | Open Activities      |
| Custom Object 1    | AppointmentOpenChildList         | Open Appointments    |
| Custom Object 1    | AssetChildList                   | Assets               |
| Custom Object 1    | Audit Trail.ChildList            | Audit Trail          |
| Custom Object 1    | Certification.ChildList          | Certifications       |
| Custom Object 1    | Course.ChildList                 | Courses              |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name     |
|--------------------|-----------------------------------|-----------------------|
| Custom Object 1    | CRMOD_LS_Transactions.ChildList   | Sample Transactions   |
| Custom Object 1    | CRMODLS_InventoryPeriod.ChildList | Inventory Periods     |
| Custom Object 1    | CRMODLS_SampleLot.ChildList       | Sample Lots           |
| Custom Object 1    | CustObj1BookChildList             | Books                 |
| Custom Object 1    | CustObj1ChildList                 | Custom Objects 01     |
| Custom Object 1    | CustObj1FACHildList               | Attachments           |
| Custom Object 1    | CustObj1NoteChildList             | Notes                 |
| Custom Object 1    | CustObj1TeamChildList             | Custom Object 01 Team |
| Custom Object 1    | CustObj2ChildList                 | Custom Objects 02     |
| Custom Object 1    | CustObj3ChildList                 | Custom Objects 03     |
| Custom Object 1    | CustObjAccountChildList           | Accounts              |
| Custom Object 1    | CustObjCampaignChildList          | Campaigns             |
| Custom Object 1    | CustObjContactChildList           | Contacts              |
| Custom Object 1    | CustObjDealerChildList            | Dealers               |
| Custom Object 1    | CustObjFundChildList              | Funds                 |
| Custom Object 1    | CustObjHouseholdChildList         | Households            |
| Custom Object 1    | CustObjLeadChildList              | Leads                 |
| Custom Object 1    | CustObjMedEdChildList             | Events                |
| Custom Object 1    | CustObjOpportunityChildList       | Opportunities         |
| Custom Object 1    | CustObjPartnerChildList           | Partners              |
| Custom Object 1    | CustObjPortfolioChildList         | Portfolios            |
| Custom Object 1    | CustObjProductChildList           | Products              |
| Custom Object 1    | CustObjSolutionChildList          | Solutions             |
| Custom Object 1    | CustomObject10.ChildList          | Custom Objects 10     |
| Custom Object 1    | CustomObject11.ChildList          | Custom Objects 11     |
| Custom Object 1    | CustomObject12.ChildList          | Custom Objects 12     |
| Custom Object 1    | CustomObject13.ChildList          | Custom Objects 13     |
| Custom Object 1    | CustomObject14.ChildList          | Custom Objects 14     |
| Custom Object 1    | CustomObject15.ChildList          | Custom Objects 15     |
| Custom Object 1    | CustomObject4.ChildList           | Custom Objects 04     |
| Custom Object 1    | CustomObject5.ChildList           | Custom Objects 05     |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name        |
|--------------------|-----------------------------------|--------------------------|
| Custom Object 1    | CustomObject6.ChildList           | Custom Objects 06        |
| Custom Object 1    | CustomObject7.ChildList           | Custom Objects 07        |
| Custom Object 1    | CustomObject8.ChildList           | Custom Objects 08        |
| Custom Object 1    | CustomObject9.ChildList           | Custom Objects 09        |
| Custom Object 1    | DealRegistration.ChildList        | Deal Registrations       |
| Custom Object 1    | Exam.ChildList                    | Exams                    |
| Custom Object 1    | FinancialAccount.ChildList        | Financial Accounts       |
| Custom Object 1    | MDFRequest.ChildList              | MDF Requests             |
| Custom Object 1    | Policy.ChildList                  | Policies                 |
| Custom Object 1    | SPRequest.ChildList               | Special Pricing Requests |
| Custom Object 1    | SRChildList                       | Service Requests         |
| Custom Object 1    | TaskOpenChildList                 | Open Tasks               |
| Custom Object 1    | VehicleChildList                  | Vehicles                 |
| Custom Object 2    | Accreditation.ChildList           | Accreditations           |
| Custom Object 2    | ActivityClosedChildList           | Completed Activities     |
| Custom Object 2    | ActivityOpenChildList             | Open Activities          |
| Custom Object 2    | AppointmentOpenChildList          | Open Appointments        |
| Custom Object 2    | AssetChildList                    | Assets                   |
| Custom Object 2    | Audit Trail.ChildList             | Audit Trail              |
| Custom Object 2    | Certification.ChildList           | Certifications           |
| Custom Object 2    | Course.ChildList                  | Courses                  |
| Custom Object 2    | CRMOD_LS_Transactions.ChildList   | Sample Transactions      |
| Custom Object 2    | CRMODLS_InventoryPeriod.ChildList | Inventory Periods        |
| Custom Object 2    | CRMODLS_SampleLot.ChildList       | Sample Lots              |
| Custom Object 2    | CustObj1ChildList                 | Custom Objects 01        |
| Custom Object 2    | CustObj2BookChildList             | Books                    |
| Custom Object 2    | CustObj2ChildList                 | Custom Objects 02        |
| Custom Object 2    | CustObj2FACHildList               | Attachments              |
| Custom Object 2    | CustObj2NoteChildList             | Notes                    |
| Custom Object 2    | CustObj2TeamChildList             | Custom Object 02 Team    |
| Custom Object 2    | CustObj3ChildList                 | Custom Objects 03        |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id             | Child Applet Name        |
|--------------------|-----------------------------|--------------------------|
| Custom Object 2    | CustObjAccountChildList     | Accounts                 |
| Custom Object 2    | CustObjCampaignChildList    | Campaigns                |
| Custom Object 2    | CustObjContactChildList     | Contacts                 |
| Custom Object 2    | CustObjDealerChildList      | Dealers                  |
| Custom Object 2    | CustObjFundChildList        | Funds                    |
| Custom Object 2    | CustObjHouseholdChildList   | Households               |
| Custom Object 2    | CustObjLeadChildList        | Leads                    |
| Custom Object 2    | CustObjMedEdChildList       | Events                   |
| Custom Object 2    | CustObjOpportunityChildList | Opportunities            |
| Custom Object 2    | CustObjPartnerChildList     | Partners                 |
| Custom Object 2    | CustObjPortfolioChildList   | Portfolios               |
| Custom Object 2    | CustObjProductChildList     | Products                 |
| Custom Object 2    | CustObjSolutionChildList    | Solutions                |
| Custom Object 2    | CustomObject10.ChildList    | Custom Objects 10        |
| Custom Object 2    | CustomObject11.ChildList    | Custom Objects 11        |
| Custom Object 2    | CustomObject12.ChildList    | Custom Objects 12        |
| Custom Object 2    | CustomObject13.ChildList    | Custom Objects 13        |
| Custom Object 2    | CustomObject14.ChildList    | Custom Objects 14        |
| Custom Object 2    | CustomObject15.ChildList    | Custom Objects 15        |
| Custom Object 2    | CustomObject4.ChildList     | Custom Objects 04        |
| Custom Object 2    | CustomObject5.ChildList     | Custom Objects 05        |
| Custom Object 2    | CustomObject6.ChildList     | Custom Objects 06        |
| Custom Object 2    | CustomObject7.ChildList     | Custom Objects 07        |
| Custom Object 2    | CustomObject8.ChildList     | Custom Objects 08        |
| Custom Object 2    | CustomObject9.ChildList     | Custom Objects 09        |
| Custom Object 2    | DealRegistration.ChildList  | Deal Registrations       |
| Custom Object 2    | Exam.ChildList              | Exams                    |
| Custom Object 2    | FinancialAccount.ChildList  | Financial Accounts       |
| Custom Object 2    | MDFRequest.ChildList        | MDF Requests             |
| Custom Object 2    | Policy.ChildList            | Policies                 |
| Custom Object 2    | SPRequest.ChildList         | Special Pricing Requests |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name     |
|--------------------|-----------------------------------|-----------------------|
| Custom Object 2    | SRChildList                       | Service Requests      |
| Custom Object 2    | TaskOpenChildList                 | Open Tasks            |
| Custom Object 2    | VehicleChildList                  | Vehicles              |
| Custom Object 3    | Accreditation.ChildList           | Accreditations        |
| Custom Object 3    | ActivityClosedChildList           | Completed Activities  |
| Custom Object 3    | ActivityOpenChildList             | Open Activities       |
| Custom Object 3    | AppointmentOpenChildList          | Open Appointments     |
| Custom Object 3    | AssetChildList                    | Assets                |
| Custom Object 3    | Audit Trail.ChildList             | Audit Trail           |
| Custom Object 3    | Certification.ChildList           | Certifications        |
| Custom Object 3    | Course.ChildList                  | Courses               |
| Custom Object 3    | CRMODLS_LS_Transactions.ChildList | Sample Transactions   |
| Custom Object 3    | CRMODLS_InventoryPeriod.ChildList | Inventory Periods     |
| Custom Object 3    | CRMODLS_SampleLot.ChildList       | Sample Lots           |
| Custom Object 3    | CustObj1ChildList                 | Custom Objects 01     |
| Custom Object 3    | CustObj2ChildList                 | Custom Objects 02     |
| Custom Object 3    | CustObj3BookChildList             | Books                 |
| Custom Object 3    | CustObj3ChildList                 | Custom Objects 03     |
| Custom Object 3    | CustObj3FACHildList               | Attachments           |
| Custom Object 3    | CustObj3NoteChildList             | Notes                 |
| Custom Object 3    | CustObj3TeamChildList             | Custom Object 03 Team |
| Custom Object 3    | CustObjAccountChildList           | Accounts              |
| Custom Object 3    | CustObjCampaignChildList          | Campaigns             |
| Custom Object 3    | CustObjContactChildList           | Contacts              |
| Custom Object 3    | CustObjDealerChildList            | Dealers               |
| Custom Object 3    | CustObjFundChildList              | Funds                 |
| Custom Object 3    | CustObjHouseholdChildList         | Households            |
| Custom Object 3    | CustObjLeadChildList              | Leads                 |
| Custom Object 3    | CustObjMedEdChildList             | Events                |
| Custom Object 3    | CustObjOpportunityChildList       | Opportunities         |
| Custom Object 3    | CustObjPartnerChildList           | Partners              |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id            | Child Applet Name        |
|--------------------|----------------------------|--------------------------|
| Custom Object 3    | CustObjPortfolioChildList  | Portfolios               |
| Custom Object 3    | CustObjProductChildList    | Products                 |
| Custom Object 3    | CustObjSolutionChildList   | Solutions                |
| Custom Object 3    | CustomObject10.ChildList   | Custom Objects 10        |
| Custom Object 3    | CustomObject11.ChildList   | Custom Objects 11        |
| Custom Object 3    | CustomObject12.ChildList   | Custom Objects 12        |
| Custom Object 3    | CustomObject13.ChildList   | Custom Objects 13        |
| Custom Object 3    | CustomObject14.ChildList   | Custom Objects 14        |
| Custom Object 3    | CustomObject15.ChildList   | Custom Objects 15        |
| Custom Object 3    | CustomObject4.ChildList    | Custom Objects 04        |
| Custom Object 3    | CustomObject5.ChildList    | Custom Objects 05        |
| Custom Object 3    | CustomObject6.ChildList    | Custom Objects 06        |
| Custom Object 3    | CustomObject7.ChildList    | Custom Objects 07        |
| Custom Object 3    | CustomObject8.ChildList    | Custom Objects 08        |
| Custom Object 3    | CustomObject9.ChildList    | Custom Objects 09        |
| Custom Object 3    | DealRegistration.ChildList | Deal Registrations       |
| Custom Object 3    | Exam.ChildList             | Exams                    |
| Custom Object 3    | FinancialAccount.ChildList | Financial Accounts       |
| Custom Object 3    | MDFRequest.ChildList       | MDF Requests             |
| Custom Object 3    | Policy.ChildList           | Policies                 |
| Custom Object 3    | SPRequest.ChildList        | Special Pricing Requests |
| Custom Object 3    | SRChildList                | Service Requests         |
| Custom Object 3    | TaskOpenChildList          | Open Tasks               |
| Custom Object 3    | VehicleChildList           | Vehicles                 |
| CustomObject10     | Account.ChildList          | Accounts                 |
| CustomObject10     | Accreditation.ChildList    | Accreditations           |
| CustomObject10     | Activity.ChildList         | Activities               |
| CustomObject10     | ActivityClosedChildList    | Completed Activities     |
| CustomObject10     | AppointmentOpenChildList   | Open Appointments        |
| CustomObject10     | Asset.ChildList            | Assets                   |
| CustomObject10     | Audit Trail.ChildList      | Audit Trail              |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name      |
|--------------------|-----------------------------------|------------------------|
| CustomObject10     | Campaign.ChildList                | Campaigns              |
| CustomObject10     | Certification.ChildList           | Certifications         |
| CustomObject10     | Channel Partner.ChildList         | Dealers                |
| CustomObject10     | Contact.ChildList                 | Contacts               |
| CustomObject10     | Course.ChildList                  | Courses                |
| CustomObject10     | CRMOD_LS_Transactions.ChildList   | Sample Transactions    |
| CustomObject10     | CRMODLS_InventoryPeriod.ChildList | Inventory Periods      |
| CustomObject10     | CRMODLS_SampleLot.ChildList       | Sample Lots            |
| CustomObject10     | Custom Object 1.ChildList         | Custom Objects 01      |
| CustomObject10     | Custom Object 2.ChildList         | Custom Objects 02      |
| CustomObject10     | Custom Object 3.ChildList         | Custom Objects 03      |
| CustomObject10     | CustomObject10 Book.ChildList     | Books                  |
| CustomObject10     | CustomObject10.SelfChildList      | Custom Objects 10      |
| CustomObject10     | CustomObject10Team.ChildList      | Custom Object 10 Teams |
| CustomObject10     | CustomObject11.ChildList          | Custom Objects 11      |
| CustomObject10     | CustomObject12.ChildList          | Custom Objects 12      |
| CustomObject10     | CustomObject13.ChildList          | Custom Objects 13      |
| CustomObject10     | CustomObject14.ChildList          | Custom Objects 14      |
| CustomObject10     | CustomObject15.ChildList          | Custom Objects 15      |
| CustomObject10     | CustomObject4.ChildList           | Custom Objects 04      |
| CustomObject10     | CustomObject5.ChildList           | Custom Objects 05      |
| CustomObject10     | CustomObject6.ChildList           | Custom Objects 06      |
| CustomObject10     | CustomObject7.ChildList           | Custom Objects 07      |
| CustomObject10     | CustomObject8.ChildList           | Custom Objects 08      |
| CustomObject10     | CustomObject9.ChildList           | Custom Objects 09      |
| CustomObject10     | DealRegistration.ChildList        | Deal Registrations     |
| CustomObject10     | Exam.ChildList                    | Exams                  |
| CustomObject10     | FinancialAccount.ChildList        | Financial Accounts     |
| CustomObject10     | Fund Request.ChildList            | Fund Requests          |
| CustomObject10     | Fund.ChildList                    | Funds                  |
| CustomObject10     | Household.ChildList               | Households             |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name        |
|--------------------|-----------------------------------|--------------------------|
| CustomObject10     | Lead.ChildList                    | Leads                    |
| CustomObject10     | MDFRequest.ChildList              | MDF Requests             |
| CustomObject10     | MedEdEvent.ChildList              | Events                   |
| CustomObject10     | Opportunity.ChildList             | Opportunities            |
| CustomObject10     | Partner.ChildList                 | Partners                 |
| CustomObject10     | Policy.ChildList                  | Policies                 |
| CustomObject10     | Portfolio.ChildList               | Portfolios               |
| CustomObject10     | Product.ChildList                 | Products                 |
| CustomObject10     | Program.ChildList                 | Partner Programs         |
| CustomObject10     | Revenue.ChildList                 | Revenues                 |
| CustomObject10     | Service Request.ChildList         | Service Requests         |
| CustomObject10     | Solution.ChildList                | Solutions                |
| CustomObject10     | SPRequest.ChildList               | Special Pricing Requests |
| CustomObject10     | TaskOpenChildList                 | Open Tasks               |
| CustomObject10     | Vehicle.ChildList                 | Vehicles                 |
| CustomObject11     | Account.ChildList                 | Accounts                 |
| CustomObject11     | Accreditation.ChildList           | Accreditations           |
| CustomObject11     | Activity.ChildList                | Activities               |
| CustomObject11     | ActivityClosedChildList           | Completed Activities     |
| CustomObject11     | AppointmentOpenChildList          | Open Appointments        |
| CustomObject11     | Asset.ChildList                   | Assets                   |
| CustomObject11     | Audit Trail.ChildList             | Audit Trail              |
| CustomObject11     | Campaign.ChildList                | Campaigns                |
| CustomObject11     | Certification.ChildList           | Certifications           |
| CustomObject11     | Channel Partner.ChildList         | Dealers                  |
| CustomObject11     | Contact.ChildList                 | Contacts                 |
| CustomObject11     | Course.ChildList                  | Courses                  |
| CustomObject11     | CRMOD_LS_Transactions.ChildList   | Sample Transactions      |
| CustomObject11     | CRMODLS_InventoryPeriod.ChildList | Inventory Periods        |
| CustomObject11     | CRMODLS_SampleLot.ChildList       | Sample Lots              |
| CustomObject11     | Custom Object 1.ChildList         | Custom Objects 01        |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id               | Child Applet Name      |
|--------------------|-------------------------------|------------------------|
| CustomObject11     | Custom Object 2.ChildList     | Custom Objects 02      |
| CustomObject11     | Custom Object 3.ChildList     | Custom Objects 03      |
| CustomObject11     | CustomObject10.ChildList      | Custom Objects 10      |
| CustomObject11     | CustomObject11 Book.ChildList | Books                  |
| CustomObject11     | CustomObject11.SelfChildList  | Custom Objects 11      |
| CustomObject11     | CustomObject11Team.ChildList  | Custom Object 11 Teams |
| CustomObject11     | CustomObject12.ChildList      | Custom Objects 12      |
| CustomObject11     | CustomObject13.ChildList      | Custom Objects 13      |
| CustomObject11     | CustomObject14.ChildList      | Custom Objects 14      |
| CustomObject11     | CustomObject15.ChildList      | Custom Objects 15      |
| CustomObject11     | CustomObject4.ChildList       | Custom Objects 04      |
| CustomObject11     | CustomObject5.ChildList       | Custom Objects 05      |
| CustomObject11     | CustomObject6.ChildList       | Custom Objects 06      |
| CustomObject11     | CustomObject7.ChildList       | Custom Objects 07      |
| CustomObject11     | CustomObject8.ChildList       | Custom Objects 08      |
| CustomObject11     | CustomObject9.ChildList       | Custom Objects 09      |
| CustomObject11     | DealRegistration.ChildList    | Deal Registrations     |
| CustomObject11     | Exam.ChildList                | Exams                  |
| CustomObject11     | FinancialAccount.ChildList    | Financial Accounts     |
| CustomObject11     | Fund Request.ChildList        | Fund Requests          |
| CustomObject11     | Fund.ChildList                | Funds                  |
| CustomObject11     | Household.ChildList           | Households             |
| CustomObject11     | Lead.ChildList                | Leads                  |
| CustomObject11     | MDFRequest.ChildList          | MDF Requests           |
| CustomObject11     | MedEdEvent.ChildList          | Events                 |
| CustomObject11     | Opportunity.ChildList         | Opportunities          |
| CustomObject11     | Partner.ChildList             | Partners               |
| CustomObject11     | Policy.ChildList              | Policies               |
| CustomObject11     | Portfolio.ChildList           | Portfolios             |
| CustomObject11     | Product.ChildList             | Products               |
| CustomObject11     | Program.ChildList             | Partner Programs       |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name        |
|--------------------|-----------------------------------|--------------------------|
| CustomObject11     | Revenue.ChildList                 | Revenues                 |
| CustomObject11     | Service Request.ChildList         | Service Requests         |
| CustomObject11     | Solution.ChildList                | Solutions                |
| CustomObject11     | SPRequest.ChildList               | Special Pricing Requests |
| CustomObject11     | TaskOpenChildList                 | Open Tasks               |
| CustomObject11     | Vehicle.ChildList                 | Vehicles                 |
| CustomObject12     | Account.ChildList                 | Accounts                 |
| CustomObject12     | Accreditation.ChildList           | Accreditations           |
| CustomObject12     | Activity.ChildList                | Activities               |
| CustomObject12     | ActivityClosedChildList           | Completed Activities     |
| CustomObject12     | AppointmentOpenChildList          | Open Appointments        |
| CustomObject12     | Asset.ChildList                   | Assets                   |
| CustomObject12     | Audit Trail.ChildList             | Audit Trail              |
| CustomObject12     | Campaign.ChildList                | Campaigns                |
| CustomObject12     | Certification.ChildList           | Certifications           |
| CustomObject12     | Channel Partner.ChildList         | Dealers                  |
| CustomObject12     | Contact.ChildList                 | Contacts                 |
| CustomObject12     | Course.ChildList                  | Courses                  |
| CustomObject12     | CRMOD_LS_Transactions.ChildList   | Sample Transactions      |
| CustomObject12     | CRMODLS_InventoryPeriod.ChildList | Inventory Periods        |
| CustomObject12     | CRMODLS_SampleLot.ChildList       | Sample Lots              |
| CustomObject12     | Custom Object 1.ChildList         | Custom Objects 01        |
| CustomObject12     | Custom Object 2.ChildList         | Custom Objects 02        |
| CustomObject12     | Custom Object 3.ChildList         | Custom Objects 03        |
| CustomObject12     | CustomObject10.ChildList          | Custom Objects 10        |
| CustomObject12     | CustomObject11.ChildList          | Custom Objects 11        |
| CustomObject12     | CustomObject12 Book.ChildList     | Books                    |
| CustomObject12     | CustomObject12.SelfChildList      | Custom Objects 12        |
| CustomObject12     | CustomObject12Team.ChildList      | Custom Object 12 Teams   |
| CustomObject12     | CustomObject13.ChildList          | Custom Objects 13        |
| CustomObject12     | CustomObject14.ChildList          | Custom Objects 14        |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id            | Child Applet Name        |
|--------------------|----------------------------|--------------------------|
| CustomObject12     | CustomObject15.ChildList   | Custom Objects 15        |
| CustomObject12     | CustomObject4.ChildList    | Custom Objects 04        |
| CustomObject12     | CustomObject5.ChildList    | Custom Objects 05        |
| CustomObject12     | CustomObject6.ChildList    | Custom Objects 06        |
| CustomObject12     | CustomObject7.ChildList    | Custom Objects 07        |
| CustomObject12     | CustomObject8.ChildList    | Custom Objects 08        |
| CustomObject12     | CustomObject9.ChildList    | Custom Objects 09        |
| CustomObject12     | DealRegistration.ChildList | Deal Registrations       |
| CustomObject12     | Exam.ChildList             | Exams                    |
| CustomObject12     | FinancialAccount.ChildList | Financial Accounts       |
| CustomObject12     | Fund Request.ChildList     | Fund Requests            |
| CustomObject12     | Fund.ChildList             | Funds                    |
| CustomObject12     | Household.ChildList        | Households               |
| CustomObject12     | Lead.ChildList             | Leads                    |
| CustomObject12     | MDFRequest.ChildList       | MDF Requests             |
| CustomObject12     | MedEdEvent.ChildList       | Events                   |
| CustomObject12     | Opportunity.ChildList      | Opportunities            |
| CustomObject12     | Partner.ChildList          | Partners                 |
| CustomObject12     | Policy.ChildList           | Policies                 |
| CustomObject12     | Portfolio.ChildList        | Portfolios               |
| CustomObject12     | Product.ChildList          | Products                 |
| CustomObject12     | Program.ChildList          | Partner Programs         |
| CustomObject12     | Revenue.ChildList          | Revenues                 |
| CustomObject12     | Service Request.ChildList  | Service Requests         |
| CustomObject12     | Solution.ChildList         | Solutions                |
| CustomObject12     | SPRequest.ChildList        | Special Pricing Requests |
| CustomObject12     | TaskOpenChildList          | Open Tasks               |
| CustomObject12     | Vehicle.ChildList          | Vehicles                 |
| CustomObject13     | Account.ChildList          | Accounts                 |
| CustomObject13     | Accreditation.ChildList    | Accreditations           |
| CustomObject13     | Activity.ChildList         | Activities               |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name      |
|--------------------|-----------------------------------|------------------------|
| CustomObject13     | ActivityClosedChildList           | Completed Activities   |
| CustomObject13     | AppointmentOpenChildList          | Open Appointments      |
| CustomObject13     | Asset.ChildList                   | Assets                 |
| CustomObject13     | Audit Trail.ChildList             | Audit Trail            |
| CustomObject13     | Campaign.ChildList                | Campaigns              |
| CustomObject13     | Certification.ChildList           | Certifications         |
| CustomObject13     | Channel Partner.ChildList         | Dealers                |
| CustomObject13     | Contact.ChildList                 | Contacts               |
| CustomObject13     | Course.ChildList                  | Courses                |
| CustomObject13     | CRMOD_LS_Transactions.ChildList   | Sample Transactions    |
| CustomObject13     | CRMODLS_InventoryPeriod.ChildList | Inventory Periods      |
| CustomObject13     | CRMODLS_SampleLot.ChildList       | Sample Lots            |
| CustomObject13     | Custom Object 1.ChildList         | Custom Objects 01      |
| CustomObject13     | Custom Object 2.ChildList         | Custom Objects 02      |
| CustomObject13     | Custom Object 3.ChildList         | Custom Objects 03      |
| CustomObject13     | CustomObject10.ChildList          | Custom Objects 10      |
| CustomObject13     | CustomObject11.ChildList          | Custom Objects 11      |
| CustomObject13     | CustomObject12.ChildList          | Custom Objects 12      |
| CustomObject13     | CustomObject13 Book.ChildList     | Books                  |
| CustomObject13     | CustomObject13.SelfChildList      | Custom Objects 13      |
| CustomObject13     | CustomObject13Team.ChildList      | Custom Object 13 Teams |
| CustomObject13     | CustomObject14.ChildList          | Custom Objects 14      |
| CustomObject13     | CustomObject15.ChildList          | Custom Objects 15      |
| CustomObject13     | CustomObject4.ChildList           | Custom Objects 04      |
| CustomObject13     | CustomObject5.ChildList           | Custom Objects 05      |
| CustomObject13     | CustomObject6.ChildList           | Custom Objects 06      |
| CustomObject13     | CustomObject7.ChildList           | Custom Objects 07      |
| CustomObject13     | CustomObject8.ChildList           | Custom Objects 08      |
| CustomObject13     | CustomObject9.ChildList           | Custom Objects 09      |
| CustomObject13     | DealRegistration.ChildList        | Deal Registrations     |
| CustomObject13     | Exam.ChildList                    | Exams                  |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id            | Child Applet Name        |
|--------------------|----------------------------|--------------------------|
| CustomObject13     | FinancialAccount.ChildList | Financial Accounts       |
| CustomObject13     | Fund Request.ChildList     | Fund Requests            |
| CustomObject13     | Fund.ChildList             | Funds                    |
| CustomObject13     | Household.ChildList        | Households               |
| CustomObject13     | Lead.ChildList             | Leads                    |
| CustomObject13     | MDFRequest.ChildList       | MDF Requests             |
| CustomObject13     | MedEdEvent.ChildList       | Events                   |
| CustomObject13     | Opportunity.ChildList      | Opportunities            |
| CustomObject13     | Partner.ChildList          | Partners                 |
| CustomObject13     | Policy.ChildList           | Policies                 |
| CustomObject13     | Portfolio.ChildList        | Portfolios               |
| CustomObject13     | Product.ChildList          | Products                 |
| CustomObject13     | Program.ChildList          | Partner Programs         |
| CustomObject13     | Revenue.ChildList          | Revenues                 |
| CustomObject13     | Service Request.ChildList  | Service Requests         |
| CustomObject13     | Solution.ChildList         | Solutions                |
| CustomObject13     | SPRequest.ChildList        | Special Pricing Requests |
| CustomObject13     | TaskOpenChildList          | Open Tasks               |
| CustomObject13     | Vehicle.ChildList          | Vehicles                 |
| CustomObject14     | Account.ChildList          | Accounts                 |
| CustomObject14     | Accreditation.ChildList    | Accreditations           |
| CustomObject14     | Activity.ChildList         | Activities               |
| CustomObject14     | ActivityClosedChildList    | Completed Activities     |
| CustomObject14     | AppointmentOpenChildList   | Open Appointments        |
| CustomObject14     | Asset.ChildList            | Assets                   |
| CustomObject14     | Audit Trail.ChildList      | Audit Trail              |
| CustomObject14     | Campaign.ChildList         | Campaigns                |
| CustomObject14     | Certification.ChildList    | Certifications           |
| CustomObject14     | Channel Partner.ChildList  | Dealers                  |
| CustomObject14     | Contact.ChildList          | Contacts                 |
| CustomObject14     | Course.ChildList           | Courses                  |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name      |
|--------------------|-----------------------------------|------------------------|
| CustomObject14     | CRMOD_LS_Transactions.ChildList   | Sample Transactions    |
| CustomObject14     | CRMODLS_InventoryPeriod.ChildList | Inventory Periods      |
| CustomObject14     | CRMODLS_SampleLot.ChildList       | Sample Lots            |
| CustomObject14     | Custom Object 1.ChildList         | Custom Objects 01      |
| CustomObject14     | Custom Object 2.ChildList         | Custom Objects 02      |
| CustomObject14     | Custom Object 3.ChildList         | Custom Objects 03      |
| CustomObject14     | CustomObject10.ChildList          | Custom Objects 10      |
| CustomObject14     | CustomObject11.ChildList          | Custom Objects 11      |
| CustomObject14     | CustomObject12.ChildList          | Custom Objects 12      |
| CustomObject14     | CustomObject13.ChildList          | Custom Objects 13      |
| CustomObject14     | CustomObject14 Book.ChildList     | Books                  |
| CustomObject14     | CustomObject14.SelfChildList      | Custom Objects 14      |
| CustomObject14     | CustomObject14Team.ChildList      | Custom Object 14 Teams |
| CustomObject14     | CustomObject15.ChildList          | Custom Objects 15      |
| CustomObject14     | CustomObject4.ChildList           | Custom Objects 04      |
| CustomObject14     | CustomObject5.ChildList           | Custom Objects 05      |
| CustomObject14     | CustomObject6.ChildList           | Custom Objects 06      |
| CustomObject14     | CustomObject7.ChildList           | Custom Objects 07      |
| CustomObject14     | CustomObject8.ChildList           | Custom Objects 08      |
| CustomObject14     | CustomObject9.ChildList           | Custom Objects 09      |
| CustomObject14     | DealRegistration.ChildList        | Deal Registrations     |
| CustomObject14     | Exam.ChildList                    | Exams                  |
| CustomObject14     | FinancialAccount.ChildList        | Financial Accounts     |
| CustomObject14     | Fund Request.ChildList            | Fund Requests          |
| CustomObject14     | Fund.ChildList                    | Funds                  |
| CustomObject14     | Household.ChildList               | Households             |
| CustomObject14     | Lead.ChildList                    | Leads                  |
| CustomObject14     | MDFRequest.ChildList              | MDF Requests           |
| CustomObject14     | MedEdEvent.ChildList              | Events                 |
| CustomObject14     | Opportunity.ChildList             | Opportunities          |
| CustomObject14     | Partner.ChildList                 | Partners               |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name        |
|--------------------|-----------------------------------|--------------------------|
| CustomObject14     | Policy.ChildList                  | Policies                 |
| CustomObject14     | Portfolio.ChildList               | Portfolios               |
| CustomObject14     | Product.ChildList                 | Products                 |
| CustomObject14     | Program.ChildList                 | Partner Programs         |
| CustomObject14     | Revenue.ChildList                 | Revenues                 |
| CustomObject14     | Service Request.ChildList         | Service Requests         |
| CustomObject14     | Solution.ChildList                | Solutions                |
| CustomObject14     | SPRequest.ChildList               | Special Pricing Requests |
| CustomObject14     | TaskOpenChildList                 | Open Tasks               |
| CustomObject14     | Vehicle.ChildList                 | Vehicles                 |
| CustomObject15     | Account.ChildList                 | Accounts                 |
| CustomObject15     | Accreditation.ChildList           | Accreditations           |
| CustomObject15     | Activity.ChildList                | Activities               |
| CustomObject15     | ActivityClosedChildList           | Completed Activities     |
| CustomObject15     | AppointmentOpenChildList          | Open Appointments        |
| CustomObject15     | Asset.ChildList                   | Assets                   |
| CustomObject15     | Audit Trail.ChildList             | Audit Trail              |
| CustomObject15     | Campaign.ChildList                | Campaigns                |
| CustomObject15     | Certification.ChildList           | Certifications           |
| CustomObject15     | Channel Partner.ChildList         | Dealers                  |
| CustomObject15     | Contact.ChildList                 | Contacts                 |
| CustomObject15     | Course.ChildList                  | Courses                  |
| CustomObject15     | CRMOD_LS_Transactions.ChildList   | Sample Transactions      |
| CustomObject15     | CRMODLS_InventoryPeriod.ChildList | Inventory Periods        |
| CustomObject15     | CRMODLS_SampleLot.ChildList       | Sample Lots              |
| CustomObject15     | Custom Object 1.ChildList         | Custom Objects 01        |
| CustomObject15     | Custom Object 2.ChildList         | Custom Objects 02        |
| CustomObject15     | Custom Object 3.ChildList         | Custom Objects 03        |
| CustomObject15     | CustomObject10.ChildList          | Custom Objects 10        |
| CustomObject15     | CustomObject11.ChildList          | Custom Objects 11        |
| CustomObject15     | CustomObject12.ChildList          | Custom Objects 12        |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id               | Child Applet Name        |
|--------------------|-------------------------------|--------------------------|
| CustomObject15     | CustomObject13.ChildList      | Custom Objects 13        |
| CustomObject15     | CustomObject14.ChildList      | Custom Objects 14        |
| CustomObject15     | CustomObject15 Book.ChildList | Books                    |
| CustomObject15     | CustomObject15.SelfChildList  | Custom Objects 15        |
| CustomObject15     | CustomObject15Team.ChildList  | Custom Object 15 Teams   |
| CustomObject15     | CustomObject4.ChildList       | Custom Objects 04        |
| CustomObject15     | CustomObject5.ChildList       | Custom Objects 05        |
| CustomObject15     | CustomObject6.ChildList       | Custom Objects 06        |
| CustomObject15     | CustomObject7.ChildList       | Custom Objects 07        |
| CustomObject15     | CustomObject8.ChildList       | Custom Objects 08        |
| CustomObject15     | CustomObject9.ChildList       | Custom Objects 09        |
| CustomObject15     | DealRegistration.ChildList    | Deal Registrations       |
| CustomObject15     | Exam.ChildList                | Exams                    |
| CustomObject15     | FinancialAccount.ChildList    | Financial Accounts       |
| CustomObject15     | Fund Request.ChildList        | Fund Requests            |
| CustomObject15     | Fund.ChildList                | Funds                    |
| CustomObject15     | Household.ChildList           | Households               |
| CustomObject15     | Lead.ChildList                | Leads                    |
| CustomObject15     | MDFRequest.ChildList          | MDF Requests             |
| CustomObject15     | MedEdEvent.ChildList          | Events                   |
| CustomObject15     | Opportunity.ChildList         | Opportunities            |
| CustomObject15     | Partner.ChildList             | Partners                 |
| CustomObject15     | Policy.ChildList              | Policies                 |
| CustomObject15     | Portfolio.ChildList           | Portfolios               |
| CustomObject15     | Product.ChildList             | Products                 |
| CustomObject15     | Program.ChildList             | Partner Programs         |
| CustomObject15     | Revenue.ChildList             | Revenues                 |
| CustomObject15     | Service Request.ChildList     | Service Requests         |
| CustomObject15     | Solution.ChildList            | Solutions                |
| CustomObject15     | SPRequest.ChildList           | Special Pricing Requests |
| CustomObject15     | TaskOpenChildList             | Open Tasks               |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name      |
|--------------------|-----------------------------------|------------------------|
| CustomObject15     | Vehicle.ChildList                 | Vehicles               |
| CustomObject4      | Account.ChildList                 | Accounts               |
| CustomObject4      | Accreditation.ChildList           | Accreditations         |
| CustomObject4      | Activity.ChildList                | Activities             |
| CustomObject4      | ActivityClosedChildList           | Completed Activities   |
| CustomObject4      | AppointmentOpenChildList          | Open Appointments      |
| CustomObject4      | Asset.ChildList                   | Assets                 |
| CustomObject4      | Audit Trail.ChildList             | Audit Trail            |
| CustomObject4      | Campaign.ChildList                | Campaigns              |
| CustomObject4      | Certification.ChildList           | Certifications         |
| CustomObject4      | Channel Partner.ChildList         | Dealers                |
| CustomObject4      | Contact.ChildList                 | Contacts               |
| CustomObject4      | Course.ChildList                  | Courses                |
| CustomObject4      | CRMOD_LS_Transactions.ChildList   | Sample Transactions    |
| CustomObject4      | CRMODLS_InventoryPeriod.ChildList | Inventory Periods      |
| CustomObject4      | CRMODLS_SampleLot.ChildList       | Sample Lots            |
| CustomObject4      | Custom Object 1.ChildList         | Custom Objects 01      |
| CustomObject4      | Custom Object 2.ChildList         | Custom Objects 02      |
| CustomObject4      | Custom Object 3.ChildList         | Custom Objects 03      |
| CustomObject4      | CustomObject10.ChildList          | Custom Objects 10      |
| CustomObject4      | CustomObject11.ChildList          | Custom Objects 11      |
| CustomObject4      | CustomObject12.ChildList          | Custom Objects 12      |
| CustomObject4      | CustomObject13.ChildList          | Custom Objects 13      |
| CustomObject4      | CustomObject14.ChildList          | Custom Objects 14      |
| CustomObject4      | CustomObject15.ChildList          | Custom Objects 15      |
| CustomObject4      | CustomObject4 Book.ChildList      | Books                  |
| CustomObject4      | CustomObject4.SelfChildList       | Custom Objects 04      |
| CustomObject4      | CustomObject4Team.ChildList       | Custom Object 04 Teams |
| CustomObject4      | CustomObject5.ChildList           | Custom Objects 05      |
| CustomObject4      | CustomObject6.ChildList           | Custom Objects 06      |
| CustomObject4      | CustomObject7.ChildList           | Custom Objects 07      |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id            | Child Applet Name        |
|--------------------|----------------------------|--------------------------|
| CustomObject4      | CustomObject8.ChildList    | Custom Objects 08        |
| CustomObject4      | CustomObject9.ChildList    | Custom Objects 09        |
| CustomObject4      | DealRegistration.ChildList | Deal Registrations       |
| CustomObject4      | Exam.ChildList             | Exams                    |
| CustomObject4      | FinancialAccount.ChildList | Financial Accounts       |
| CustomObject4      | Fund Request.ChildList     | Fund Requests            |
| CustomObject4      | Fund.ChildList             | Funds                    |
| CustomObject4      | Household.ChildList        | Households               |
| CustomObject4      | Lead.ChildList             | Leads                    |
| CustomObject4      | MDFRequest.ChildList       | MDF Requests             |
| CustomObject4      | MedEdEvent.ChildList       | Events                   |
| CustomObject4      | Opportunity.ChildList      | Opportunities            |
| CustomObject4      | Partner.ChildList          | Partners                 |
| CustomObject4      | Policy.ChildList           | Policies                 |
| CustomObject4      | Portfolio.ChildList        | Portfolios               |
| CustomObject4      | Product.ChildList          | Products                 |
| CustomObject4      | Program.ChildList          | Partner Programs         |
| CustomObject4      | Revenue.ChildList          | Revenues                 |
| CustomObject4      | Service Request.ChildList  | Service Requests         |
| CustomObject4      | Solution.ChildList         | Solutions                |
| CustomObject4      | SPRequest.ChildList        | Special Pricing Requests |
| CustomObject4      | TaskOpenChildList          | Open Tasks               |
| CustomObject4      | Vehicle.ChildList          | Vehicles                 |
| CustomObject5      | Account.ChildList          | Accounts                 |
| CustomObject5      | Accreditation.ChildList    | Accreditations           |
| CustomObject5      | Activity.ChildList         | Activities               |
| CustomObject5      | ActivityClosedChildList    | Completed Activities     |
| CustomObject5      | AppointmentOpenChildList   | Open Appointments        |
| CustomObject5      | Asset.ChildList            | Assets                   |
| CustomObject5      | Audit Trail.ChildList      | Audit Trail              |
| CustomObject5      | Campaign.ChildList         | Campaigns                |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name      |
|--------------------|-----------------------------------|------------------------|
| CustomObject5      | Certification.ChildList           | Certifications         |
| CustomObject5      | Channel Partner.ChildList         | Dealers                |
| CustomObject5      | Contact.ChildList                 | Contacts               |
| CustomObject5      | Course.ChildList                  | Courses                |
| CustomObject5      | CRMOD_LS_Transactions.ChildList   | Sample Transactions    |
| CustomObject5      | CRMODLS_InventoryPeriod.ChildList | Inventory Periods      |
| CustomObject5      | CRMODLS_SampleLot.ChildList       | Sample Lots            |
| CustomObject5      | Custom Object 1.ChildList         | Custom Objects 01      |
| CustomObject5      | Custom Object 2.ChildList         | Custom Objects 02      |
| CustomObject5      | Custom Object 3.ChildList         | Custom Objects 03      |
| CustomObject5      | CustomObject10.ChildList          | Custom Objects 10      |
| CustomObject5      | CustomObject11.ChildList          | Custom Objects 11      |
| CustomObject5      | CustomObject12.ChildList          | Custom Objects 12      |
| CustomObject5      | CustomObject13.ChildList          | Custom Objects 13      |
| CustomObject5      | CustomObject14.ChildList          | Custom Objects 14      |
| CustomObject5      | CustomObject15.ChildList          | Custom Objects 15      |
| CustomObject5      | CustomObject4.ChildList           | Custom Objects 04      |
| CustomObject5      | CustomObject5 Book.ChildList      | Books                  |
| CustomObject5      | CustomObject5.SelfChildList       | Custom Objects 05      |
| CustomObject5      | CustomObject5Team.ChildList       | Custom Object 05 Teams |
| CustomObject5      | CustomObject6.ChildList           | Custom Objects 06      |
| CustomObject5      | CustomObject7.ChildList           | Custom Objects 07      |
| CustomObject5      | CustomObject8.ChildList           | Custom Objects 08      |
| CustomObject5      | CustomObject9.ChildList           | Custom Objects 09      |
| CustomObject5      | DealRegistration.ChildList        | Deal Registrations     |
| CustomObject5      | Exam.ChildList                    | Exams                  |
| CustomObject5      | FinancialAccount.ChildList        | Financial Accounts     |
| CustomObject5      | Fund Request.ChildList            | Fund Requests          |
| CustomObject5      | Fund.ChildList                    | Funds                  |
| CustomObject5      | Household.ChildList               | Households             |
| CustomObject5      | Lead.ChildList                    | Leads                  |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name        |
|--------------------|-----------------------------------|--------------------------|
| CustomObject5      | MDFRequest.ChildList              | MDF Requests             |
| CustomObject5      | MedEdEvent.ChildList              | Events                   |
| CustomObject5      | Opportunity.ChildList             | Opportunities            |
| CustomObject5      | Partner.ChildList                 | Partners                 |
| CustomObject5      | Policy.ChildList                  | Policies                 |
| CustomObject5      | Portfolio.ChildList               | Portfolios               |
| CustomObject5      | Product.ChildList                 | Products                 |
| CustomObject5      | Program.ChildList                 | Partner Programs         |
| CustomObject5      | Revenue.ChildList                 | Revenues                 |
| CustomObject5      | Service Request.ChildList         | Service Requests         |
| CustomObject5      | Solution.ChildList                | Solutions                |
| CustomObject5      | SPRequest.ChildList               | Special Pricing Requests |
| CustomObject5      | TaskOpenChildList                 | Open Tasks               |
| CustomObject5      | Vehicle.ChildList                 | Vehicles                 |
| CustomObject6      | Account.ChildList                 | Accounts                 |
| CustomObject6      | Accreditation.ChildList           | Accreditations           |
| CustomObject6      | Activity.ChildList                | Activities               |
| CustomObject6      | ActivityClosedChildList           | Completed Activities     |
| CustomObject6      | AppointmentOpenChildList          | Open Appointments        |
| CustomObject6      | Asset.ChildList                   | Assets                   |
| CustomObject6      | Audit Trail.ChildList             | Audit Trail              |
| CustomObject6      | Campaign.ChildList                | Campaigns                |
| CustomObject6      | Certification.ChildList           | Certifications           |
| CustomObject6      | Channel Partner.ChildList         | Dealers                  |
| CustomObject6      | Contact.ChildList                 | Contacts                 |
| CustomObject6      | Course.ChildList                  | Courses                  |
| CustomObject6      | CRMOD_LS_Transactions.ChildList   | Sample Transactions      |
| CustomObject6      | CRMODLS_InventoryPeriod.ChildList | Inventory Periods        |
| CustomObject6      | CRMODLS_SampleLot.ChildList       | Sample Lots              |
| CustomObject6      | Custom Object 1.ChildList         | Custom Objects 01        |
| CustomObject6      | Custom Object 2.ChildList         | Custom Objects 02        |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id              | Child Applet Name      |
|--------------------|------------------------------|------------------------|
| CustomObject6      | Custom Object 3.ChildList    | Custom Objects 03      |
| CustomObject6      | CustomObject10.ChildList     | Custom Objects 10      |
| CustomObject6      | CustomObject11.ChildList     | Custom Objects 11      |
| CustomObject6      | CustomObject12.ChildList     | Custom Objects 12      |
| CustomObject6      | CustomObject13.ChildList     | Custom Objects 13      |
| CustomObject6      | CustomObject14.ChildList     | Custom Objects 14      |
| CustomObject6      | CustomObject15.ChildList     | Custom Objects 15      |
| CustomObject6      | CustomObject4.ChildList      | Custom Objects 04      |
| CustomObject6      | CustomObject5.ChildList      | Custom Objects 05      |
| CustomObject6      | CustomObject6 Book.ChildList | Books                  |
| CustomObject6      | CustomObject6.SelfChildList  | Custom Objects 06      |
| CustomObject6      | CustomObject6Team.ChildList  | Custom Object 06 Teams |
| CustomObject6      | CustomObject7.ChildList      | Custom Objects 07      |
| CustomObject6      | CustomObject8.ChildList      | Custom Objects 08      |
| CustomObject6      | CustomObject9.ChildList      | Custom Objects 09      |
| CustomObject6      | DealRegistration.ChildList   | Deal Registrations     |
| CustomObject6      | Exam.ChildList               | Exams                  |
| CustomObject6      | FinancialAccount.ChildList   | Financial Accounts     |
| CustomObject6      | Fund Request.ChildList       | Fund Requests          |
| CustomObject6      | Fund.ChildList               | Funds                  |
| CustomObject6      | Household.ChildList          | Households             |
| CustomObject6      | Lead.ChildList               | Leads                  |
| CustomObject6      | MDFRequest.ChildList         | MDF Requests           |
| CustomObject6      | MedEdEvent.ChildList         | Events                 |
| CustomObject6      | Opportunity.ChildList        | Opportunities          |
| CustomObject6      | Partner.ChildList            | Partners               |
| CustomObject6      | Policy.ChildList             | Policies               |
| CustomObject6      | Portfolio.ChildList          | Portfolios             |
| CustomObject6      | Product.ChildList            | Products               |
| CustomObject6      | Program.ChildList            | Partner Programs       |
| CustomObject6      | Revenue.ChildList            | Revenues               |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name        |
|--------------------|-----------------------------------|--------------------------|
| CustomObject6      | Service Request.ChildList         | Service Requests         |
| CustomObject6      | Solution.ChildList                | Solutions                |
| CustomObject6      | SPRequest.ChildList               | Special Pricing Requests |
| CustomObject6      | TaskOpenChildList                 | Open Tasks               |
| CustomObject6      | Vehicle.ChildList                 | Vehicles                 |
| CustomObject7      | Account.ChildList                 | Accounts                 |
| CustomObject7      | Accreditation.ChildList           | Accreditations           |
| CustomObject7      | Activity.ChildList                | Activities               |
| CustomObject7      | ActivityClosedChildList           | Completed Activities     |
| CustomObject7      | AppointmentOpenChildList          | Open Appointments        |
| CustomObject7      | Asset.ChildList                   | Assets                   |
| CustomObject7      | Audit Trail.ChildList             | Audit Trail              |
| CustomObject7      | Campaign.ChildList                | Campaigns                |
| CustomObject7      | Certification.ChildList           | Certifications           |
| CustomObject7      | Channel Partner.ChildList         | Dealers                  |
| CustomObject7      | Contact.ChildList                 | Contacts                 |
| CustomObject7      | Course.ChildList                  | Courses                  |
| CustomObject7      | CRMOD_LS_Transactions.ChildList   | Sample Transactions      |
| CustomObject7      | CRMODLS_InventoryPeriod.ChildList | Inventory Periods        |
| CustomObject7      | CRMODLS_SampleLot.ChildList       | Sample Lots              |
| CustomObject7      | Custom Object 1.ChildList         | Custom Objects 01        |
| CustomObject7      | Custom Object 2.ChildList         | Custom Objects 02        |
| CustomObject7      | Custom Object 3.ChildList         | Custom Objects 03        |
| CustomObject7      | CustomObject10.ChildList          | Custom Objects 10        |
| CustomObject7      | CustomObject11.ChildList          | Custom Objects 11        |
| CustomObject7      | CustomObject12.ChildList          | Custom Objects 12        |
| CustomObject7      | CustomObject13.ChildList          | Custom Objects 13        |
| CustomObject7      | CustomObject14.ChildList          | Custom Objects 14        |
| CustomObject7      | CustomObject15.ChildList          | Custom Objects 15        |
| CustomObject7      | CustomObject4.ChildList           | Custom Objects 04        |
| CustomObject7      | CustomObject5.ChildList           | Custom Objects 05        |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id              | Child Applet Name        |
|--------------------|------------------------------|--------------------------|
| CustomObject7      | CustomObject6.ChildList      | Custom Objects 06        |
| CustomObject7      | CustomObject7 Book.ChildList | Books                    |
| CustomObject7      | CustomObject7.SelfChildList  | Custom Objects 07        |
| CustomObject7      | CustomObject7Team.ChildList  | Custom Object 07 Teams   |
| CustomObject7      | CustomObject8.ChildList      | Custom Objects 08        |
| CustomObject7      | CustomObject9.ChildList      | Custom Objects 09        |
| CustomObject7      | DealRegistration.ChildList   | Deal Registrations       |
| CustomObject7      | Exam.ChildList               | Exams                    |
| CustomObject7      | FinancialAccount.ChildList   | Financial Accounts       |
| CustomObject7      | Fund Request.ChildList       | Fund Requests            |
| CustomObject7      | Fund.ChildList               | Funds                    |
| CustomObject7      | Household.ChildList          | Households               |
| CustomObject7      | Lead.ChildList               | Leads                    |
| CustomObject7      | MDFRequest.ChildList         | MDF Requests             |
| CustomObject7      | MedEdEvent.ChildList         | Events                   |
| CustomObject7      | Opportunity.ChildList        | Opportunities            |
| CustomObject7      | Partner.ChildList            | Partners                 |
| CustomObject7      | Policy.ChildList             | Policies                 |
| CustomObject7      | Portfolio.ChildList          | Portfolios               |
| CustomObject7      | Product.ChildList            | Products                 |
| CustomObject7      | Program.ChildList            | Partner Programs         |
| CustomObject7      | Revenue.ChildList            | Revenues                 |
| CustomObject7      | Service Request.ChildList    | Service Requests         |
| CustomObject7      | Solution.ChildList           | Solutions                |
| CustomObject7      | SPRequest.ChildList          | Special Pricing Requests |
| CustomObject7      | TaskOpenChildList            | Open Tasks               |
| CustomObject7      | Vehicle.ChildList            | Vehicles                 |
| CustomObject8      | Account.ChildList            | Accounts                 |
| CustomObject8      | Accreditation.ChildList      | Accreditations           |
| CustomObject8      | Activity.ChildList           | Activities               |
| CustomObject8      | ActivityClosedChildList      | Completed Activities     |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name      |
|--------------------|-----------------------------------|------------------------|
| CustomObject8      | AppointmentOpenChildList          | Open Appointments      |
| CustomObject8      | Asset.ChildList                   | Assets                 |
| CustomObject8      | Audit Trail.ChildList             | Audit Trail            |
| CustomObject8      | Campaign.ChildList                | Campaigns              |
| CustomObject8      | Certification.ChildList           | Certifications         |
| CustomObject8      | Channel Partner.ChildList         | Dealers                |
| CustomObject8      | Contact.ChildList                 | Contacts               |
| CustomObject8      | Course.ChildList                  | Courses                |
| CustomObject8      | CRMOD_LS_Transactions.ChildList   | Sample Transactions    |
| CustomObject8      | CRMODLS_InventoryPeriod.ChildList | Inventory Periods      |
| CustomObject8      | CRMODLS_SampleLot.ChildList       | Sample Lots            |
| CustomObject8      | Custom Object 1.ChildList         | Custom Objects 01      |
| CustomObject8      | Custom Object 2.ChildList         | Custom Objects 02      |
| CustomObject8      | Custom Object 3.ChildList         | Custom Objects 03      |
| CustomObject8      | CustomObject10.ChildList          | Custom Objects 10      |
| CustomObject8      | CustomObject11.ChildList          | Custom Objects 11      |
| CustomObject8      | CustomObject12.ChildList          | Custom Objects 12      |
| CustomObject8      | CustomObject13.ChildList          | Custom Objects 13      |
| CustomObject8      | CustomObject14.ChildList          | Custom Objects 14      |
| CustomObject8      | CustomObject15.ChildList          | Custom Objects 15      |
| CustomObject8      | CustomObject4.ChildList           | Custom Objects 04      |
| CustomObject8      | CustomObject5.ChildList           | Custom Objects 05      |
| CustomObject8      | CustomObject6.ChildList           | Custom Objects 06      |
| CustomObject8      | CustomObject7.ChildList           | Custom Objects 07      |
| CustomObject8      | CustomObject8 Book.ChildList      | Books                  |
| CustomObject8      | CustomObject8.SelfChildList       | Custom Objects 08      |
| CustomObject8      | CustomObject8Team.ChildList       | Custom Object 08 Teams |
| CustomObject8      | CustomObject9.ChildList           | Custom Objects 09      |
| CustomObject8      | DealRegistration.ChildList        | Deal Registrations     |
| CustomObject8      | Exam.ChildList                    | Exams                  |
| CustomObject8      | FinancialAccount.ChildList        | Financial Accounts     |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name        |
|--------------------|---------------------------------|--------------------------|
| CustomObject8      | Fund Request.ChildList          | Fund Requests            |
| CustomObject8      | Fund.ChildList                  | Funds                    |
| CustomObject8      | Household.ChildList             | Households               |
| CustomObject8      | Lead.ChildList                  | Leads                    |
| CustomObject8      | MDFRequest.ChildList            | MDF Requests             |
| CustomObject8      | MedEdEvent.ChildList            | Events                   |
| CustomObject8      | Opportunity.ChildList           | Opportunities            |
| CustomObject8      | Partner.ChildList               | Partners                 |
| CustomObject8      | Policy.ChildList                | Policies                 |
| CustomObject8      | Portfolio.ChildList             | Portfolios               |
| CustomObject8      | Product.ChildList               | Products                 |
| CustomObject8      | Program.ChildList               | Partner Programs         |
| CustomObject8      | Revenue.ChildList               | Revenues                 |
| CustomObject8      | Service Request.ChildList       | Service Requests         |
| CustomObject8      | Solution.ChildList              | Solutions                |
| CustomObject8      | SPRequest.ChildList             | Special Pricing Requests |
| CustomObject8      | TaskOpenChildList               | Open Tasks               |
| CustomObject8      | Vehicle.ChildList               | Vehicles                 |
| CustomObject9      | Account.ChildList               | Accounts                 |
| CustomObject9      | Accreditation.ChildList         | Accreditations           |
| CustomObject9      | Activity.ChildList              | Activities               |
| CustomObject9      | ActivityClosedChildList         | Completed Activities     |
| CustomObject9      | AppointmentOpenChildList        | Open Appointments        |
| CustomObject9      | Asset.ChildList                 | Assets                   |
| CustomObject9      | Audit Trail.ChildList           | Audit Trail              |
| CustomObject9      | Campaign.ChildList              | Campaigns                |
| CustomObject9      | Certification.ChildList         | Certifications           |
| CustomObject9      | Channel Partner.ChildList       | Dealers                  |
| CustomObject9      | Contact.ChildList               | Contacts                 |
| CustomObject9      | Course.ChildList                | Courses                  |
| CustomObject9      | CRMOD_LS_Transactions.ChildList | Sample Transactions      |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name      |
|--------------------|-----------------------------------|------------------------|
| CustomObject9      | CRMODLS_InventoryPeriod.ChildList | Inventory Periods      |
| CustomObject9      | CRMODLS_SampleLot.ChildList       | Sample Lots            |
| CustomObject9      | Custom Object 1.ChildList         | Custom Objects 01      |
| CustomObject9      | Custom Object 2.ChildList         | Custom Objects 02      |
| CustomObject9      | Custom Object 3.ChildList         | Custom Objects 03      |
| CustomObject9      | CustomObject10.ChildList          | Custom Objects 10      |
| CustomObject9      | CustomObject11.ChildList          | Custom Objects 11      |
| CustomObject9      | CustomObject12.ChildList          | Custom Objects 12      |
| CustomObject9      | CustomObject13.ChildList          | Custom Objects 13      |
| CustomObject9      | CustomObject14.ChildList          | Custom Objects 14      |
| CustomObject9      | CustomObject15.ChildList          | Custom Objects 15      |
| CustomObject9      | CustomObject4.ChildList           | Custom Objects 04      |
| CustomObject9      | CustomObject5.ChildList           | Custom Objects 05      |
| CustomObject9      | CustomObject6.ChildList           | Custom Objects 06      |
| CustomObject9      | CustomObject7.ChildList           | Custom Objects 07      |
| CustomObject9      | CustomObject8.ChildList           | Custom Objects 08      |
| CustomObject9      | CustomObject9 Book.ChildList      | Books                  |
| CustomObject9      | CustomObject9.SelfChildList       | Custom Objects 09      |
| CustomObject9      | CustomObject9Team.ChildList       | Custom Object 09 Teams |
| CustomObject9      | DealRegistration.ChildList        | Deal Registrations     |
| CustomObject9      | Exam.ChildList                    | Exams                  |
| CustomObject9      | FinancialAccount.ChildList        | Financial Accounts     |
| CustomObject9      | Fund Request.ChildList            | Fund Requests          |
| CustomObject9      | Fund.ChildList                    | Funds                  |
| CustomObject9      | Household.ChildList               | Households             |
| CustomObject9      | Lead.ChildList                    | Leads                  |
| CustomObject9      | MDFRequest.ChildList              | MDF Requests           |
| CustomObject9      | MedEdEvent.ChildList              | Events                 |
| CustomObject9      | Opportunity.ChildList             | Opportunities          |
| CustomObject9      | Partner.ChildList                 | Partners               |
| CustomObject9      | Policy.ChildList                  | Policies               |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name                  |
|--------------------|-----------------------------------|------------------------------------|
| CustomObject9      | Portfolio.ChildList               | Portfolios                         |
| CustomObject9      | Product.ChildList                 | Products                           |
| CustomObject9      | Program.ChildList                 | Partner Programs                   |
| CustomObject9      | Revenue.ChildList                 | Revenues                           |
| CustomObject9      | Service Request.ChildList         | Service Requests                   |
| CustomObject9      | Solution.ChildList                | Solutions                          |
| CustomObject9      | SPRequest.ChildList               | Special Pricing Requests           |
| CustomObject9      | TaskOpenChildList                 | Open Tasks                         |
| CustomObject9      | Vehicle.ChildList                 | Vehicles                           |
| DealRegistration   | Activity.ChildList                | Activities                         |
| DealRegistration   | ActivityClosedChildList           | Completed Activities               |
| DealRegistration   | AppointmentOpenChildList          | Open Appointments                  |
| DealRegistration   | Audit Trail.ChildList             | Audit Trail                        |
| DealRegistration   | Custom Object 1.ChildList         | Custom Objects 01                  |
| DealRegistration   | Custom Object 2.ChildList         | Custom Objects 02                  |
| DealRegistration   | Custom Object 3.ChildList         | Custom Objects 03                  |
| DealRegistration   | CustomObject10.ChildList          | Custom Objects 10                  |
| DealRegistration   | CustomObject11.ChildList          | Custom Objects 11                  |
| DealRegistration   | CustomObject12.ChildList          | Custom Objects 12                  |
| DealRegistration   | CustomObject13.ChildList          | Custom Objects 13                  |
| DealRegistration   | CustomObject14.ChildList          | Custom Objects 14                  |
| DealRegistration   | CustomObject15.ChildList          | Custom Objects 15                  |
| DealRegistration   | CustomObject4.ChildList           | Custom Objects 04                  |
| DealRegistration   | CustomObject5.ChildList           | Custom Objects 05                  |
| DealRegistration   | CustomObject6.ChildList           | Custom Objects 06                  |
| DealRegistration   | CustomObject7.ChildList           | Custom Objects 07                  |
| DealRegistration   | CustomObject8.ChildList           | Custom Objects 08                  |
| DealRegistration   | CustomObject9.ChildList           | Custom Objects 09                  |
| DealRegistration   | DealRegistration Book.ChildList   | Books                              |
| DealRegistration   | DealRegistrationRevenue.ChildList | Deal Registration Product Revenues |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                | Child Applet Name               |
|--------------------|--------------------------------|---------------------------------|
| DealRegistration   | DealRegistrationTeam.ChildList | Deal Registration Teams         |
| DealRegistration   | Lead.ChildList                 | Leads                           |
| DealRegistration   | SPRequest.ChildList            | Special Pricing Requests        |
| DealRegistration   | TaskOpenChildList              | Open Tasks                      |
| Division           | Audit Trail.ChildList          | Audit Trail                     |
| Division           | DivisionUser.ChildList         | User List                       |
| Exam               | CertificationExam.ChildList    | Certification Exams             |
| Exam               | Course.ChildList               | Courses                         |
| Exam               | CourseExam.ChildList           | Course Exams                    |
| Exam               | Custom Object 1.ChildList      | Custom Objects 01               |
| Exam               | Custom Object 2.ChildList      | Custom Objects 02               |
| Exam               | Custom Object 3.ChildList      | Custom Objects 03               |
| Exam               | CustomObject10.ChildList       | Custom Objects 10               |
| Exam               | CustomObject11.ChildList       | Custom Objects 11               |
| Exam               | CustomObject12.ChildList       | Custom Objects 12               |
| Exam               | CustomObject13.ChildList       | Custom Objects 13               |
| Exam               | CustomObject14.ChildList       | Custom Objects 14               |
| Exam               | CustomObject15.ChildList       | Custom Objects 15               |
| Exam               | CustomObject4.ChildList        | Custom Objects 04               |
| Exam               | CustomObject5.ChildList        | Custom Objects 05               |
| Exam               | CustomObject6.ChildList        | Custom Objects 06               |
| Exam               | CustomObject7.ChildList        | Custom Objects 07               |
| Exam               | CustomObject8.ChildList        | Custom Objects 08               |
| Exam               | CustomObject9.ChildList        | Custom Objects 09               |
| Exam               | Exam Book.ChildList            | Books                           |
| Exam               | ExamAttachment.ChildList       | Exam Attachments                |
| Exam               | ExamCategory.ChildList         | Exam Product Product Categories |
| Exam               | ExamPartner.ChildList          | Exam Partners                   |
| Exam               | ExamProduct.ChildList          | Exam Products                   |
| Exam               | ExamRegistration.ChildList     | Exam Registrations              |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                   | Child Applet Name          |
|--------------------|-----------------------------------|----------------------------|
| Exam               | ExamRelationship.ChildList        | Related Exams              |
| Exam               | ExamSolution.ChildList            | Exam Solutions             |
| Exam               | ExamTeam.ChildList                | Exam Teams                 |
| FinancialAccount   | Activity.ChildList                | Activities                 |
| FinancialAccount   | ActivityClosedChildList           | Completed Activities       |
| FinancialAccount   | AppointmentOpenChildList          | Open Appointments          |
| FinancialAccount   | Custom Object 1.ChildList         | Custom Objects 01          |
| FinancialAccount   | Custom Object 2.ChildList         | Custom Objects 02          |
| FinancialAccount   | Custom Object 3.ChildList         | Custom Objects 03          |
| FinancialAccount   | CustomObject10.ChildList          | Custom Objects 10          |
| FinancialAccount   | CustomObject11.ChildList          | Custom Objects 11          |
| FinancialAccount   | CustomObject12.ChildList          | Custom Objects 12          |
| FinancialAccount   | CustomObject13.ChildList          | Custom Objects 13          |
| FinancialAccount   | CustomObject14.ChildList          | Custom Objects 14          |
| FinancialAccount   | CustomObject15.ChildList          | Custom Objects 15          |
| FinancialAccount   | CustomObject4.ChildList           | Custom Objects 04          |
| FinancialAccount   | CustomObject5.ChildList           | Custom Objects 05          |
| FinancialAccount   | CustomObject6.ChildList           | Custom Objects 06          |
| FinancialAccount   | CustomObject7.ChildList           | Custom Objects 07          |
| FinancialAccount   | CustomObject8.ChildList           | Custom Objects 08          |
| FinancialAccount   | CustomObject9.ChildList           | Custom Objects 09          |
| FinancialAccount   | FinancialAccount Book.ChildList   | Books                      |
| FinancialAccount   | FinancialAccount.SelfChildList    | Financial Accounts         |
| FinancialAccount   | FinancialAccountHolder.ChildList  | Financial Account Holders  |
| FinancialAccount   | FinancialAccountHolding.ChildList | Financial Account Holdings |
| FinancialAccount   | FinancialPlan.ChildList           | Financial Plans            |
| FinancialAccount   | FinancialTransaction.ChildList    | Financial Transactions     |
| FinancialAccount   | Lead.ChildList                    | Leads                      |
| FinancialAccount   | Opportunity.ChildList             | Opportunities              |
| FinancialAccount   | Policy.ChildList                  | Policies                   |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name   | Child Applet Id                    | Child Applet Name          |
|----------------------|------------------------------------|----------------------------|
| FinancialAccount     | Service Request.ChildList          | Service Requests           |
| FinancialAccount     | TaskOpenChildList                  | Open Tasks                 |
| FinancialPlan        | Activity.ChildList                 | Activities                 |
| FinancialPlan        | ActivityClosedChildList            | Completed Activities       |
| FinancialPlan        | AppointmentOpenChildList           | Open Appointments          |
| FinancialPlan        | FinancialPlan Book.ChildList       | Books                      |
| FinancialPlan        | Lead.ChildList                     | Leads                      |
| FinancialPlan        | Opportunity.ChildList              | Opportunities              |
| FinancialPlan        | Service Request.ChildList          | Service Requests           |
| FinancialPlan        | TaskOpenChildList                  | Open Tasks                 |
| FinancialProduct     | Coverage.ChildList                 | Coverages                  |
| FinancialProduct     | FinancialAccountHolding.ChildList  | Financial Account Holdings |
| FinancialProduct     | FinancialProduct.SelfChildList     | Financial Products         |
| FinancialProduct     | FinancialTransaction.ChildList     | Financial Transactions     |
| FinancialTransaction | FinancialTransaction.SelfChildList | Financial Transactions     |
| FinancialTransaction | Service Request.ChildList          | Service Requests           |
| Fund                 | Activity.ChildList                 | Activities                 |
| Fund                 | ActivityClosedChildList            | Completed Activities       |
| Fund                 | AppointmentOpenChildList           | Open Appointments          |
| Fund                 | CRMODLS_OBJECTIVE.ChildList        | Objectives                 |
| Fund                 | CustObj1ChildList                  | Custom Objects 01          |
| Fund                 | CustObj2ChildList                  | Custom Objects 02          |
| Fund                 | CustObj3ChildList                  | Custom Objects 03          |
| Fund                 | CustomObject10.ChildList           | Custom Objects 10          |
| Fund                 | CustomObject11.ChildList           | Custom Objects 11          |
| Fund                 | CustomObject12.ChildList           | Custom Objects 12          |
| Fund                 | CustomObject13.ChildList           | Custom Objects 13          |
| Fund                 | CustomObject14.ChildList           | Custom Objects 14          |
| Fund                 | CustomObject15.ChildList           | Custom Objects 15          |
| Fund                 | CustomObject4.ChildList            | Custom Objects 04          |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id          | Child Applet Name        |
|--------------------|--------------------------|--------------------------|
| Fund               | CustomObject5.ChildList  | Custom Objects 05        |
| Fund               | CustomObject6.ChildList  | Custom Objects 06        |
| Fund               | CustomObject7.ChildList  | Custom Objects 07        |
| Fund               | CustomObject8.ChildList  | Custom Objects 08        |
| Fund               | CustomObject9.ChildList  | Custom Objects 09        |
| Fund               | FundAuditTrailChildList  | Audit Trail              |
| Fund               | FundBookChildList        | Books                    |
| Fund               | FundCreditChildList      | Fund Credits             |
| Fund               | FundDebitChildList       | Fund Debits              |
| Fund               | FundFACHildList          | Attachments              |
| Fund               | FundNoteChildList        | Notes                    |
| Fund               | FundParticipantChildList | Fund Participants        |
| Fund               | FundPartnerChildList     | Fund Memberships         |
| Fund               | FundRequestChildList     | Fund Requests            |
| Fund               | MDFRequest.ChildList     | MDF Requests             |
| Fund               | MedEdEvent.ChildList     | Events                   |
| Fund               | SPRequest.ChildList      | Special Pricing Requests |
| Fund               | TaskOpenChildList        | Open Tasks               |
| Fund Request       | ActivityClosedChildList  | Completed Activities     |
| Fund Request       | ActivityOpenChildList    | Open Activities          |
| Fund Request       | AppointmentOpenChildList | Open Appointments        |
| Fund Request       | CustomObject10.ChildList | Custom Objects 10        |
| Fund Request       | CustomObject11.ChildList | Custom Objects 11        |
| Fund Request       | CustomObject12.ChildList | Custom Objects 12        |
| Fund Request       | CustomObject13.ChildList | Custom Objects 13        |
| Fund Request       | CustomObject14.ChildList | Custom Objects 14        |
| Fund Request       | CustomObject15.ChildList | Custom Objects 15        |
| Fund Request       | CustomObject4.ChildList  | Custom Objects 04        |
| Fund Request       | CustomObject5.ChildList  | Custom Objects 05        |
| Fund Request       | CustomObject6.ChildList  | Custom Objects 06        |
| Fund Request       | CustomObject7.ChildList  | Custom Objects 07        |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name   | Child Applet Id                     | Child Applet Name         |
|----------------------|-------------------------------------|---------------------------|
| Fund Request         | CustomObject8.ChildList             | Custom Objects 08         |
| Fund Request         | CustomObject9.ChildList             | Custom Objects 09         |
| Fund Request         | FundRequestAuditTrailChildList      | Audit Trail               |
| Fund Request         | FundRequestFACHildList              | Attachments               |
| Fund Request         | FundRequestNoteChildList            | Notes                     |
| Fund Request         | TaskOpenChildList                   | Open Tasks                |
| HCPContactAllocation | Audit Trail.ChildList               | Audit Trail               |
| HCPContactAllocation | HCPContactAllocation Book.ChildList | Books                     |
| Household            | AppointmentOpenChildList            | Open Appointments         |
| Household            | Audit Trail.ChildList               | Audit Trail               |
| Household            | Claim.ChildList                     | Claims                    |
| Household            | CustObj1ChildList                   | Custom Objects 01         |
| Household            | CustObj2ChildList                   | Custom Objects 02         |
| Household            | CustObj3ChildList                   | Custom Objects 03         |
| Household            | CustomObject10.ChildList            | Custom Objects 10         |
| Household            | CustomObject11.ChildList            | Custom Objects 11         |
| Household            | CustomObject12.ChildList            | Custom Objects 12         |
| Household            | CustomObject13.ChildList            | Custom Objects 13         |
| Household            | CustomObject14.ChildList            | Custom Objects 14         |
| Household            | CustomObject15.ChildList            | Custom Objects 15         |
| Household            | CustomObject4.ChildList             | Custom Objects 04         |
| Household            | CustomObject5.ChildList             | Custom Objects 05         |
| Household            | CustomObject6.ChildList             | Custom Objects 06         |
| Household            | CustomObject7.ChildList             | Custom Objects 07         |
| Household            | CustomObject8.ChildList             | Custom Objects 08         |
| Household            | CustomObject9.ChildList             | Custom Objects 09         |
| Household            | FinancialAccount.ChildList          | Financial Accounts        |
| Household            | FinancialAccountHolder.ChildList    | Financial Account Holders |
| Household            | FinancialPlan.ChildList             | Financial Plans           |
| Household            | HouseholdActivityClosedChildList    | Completed Activities      |
| Household            | HouseholdActivityOpenChildList      | Open Activities           |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id             | Child Applet Name    |
|--------------------|-----------------------------|----------------------|
| Household          | HouseholdBookChildList      | Books                |
| Household          | HouseholdContactChildList   | Contacts             |
| Household          | HouseholdFACHildList        | Attachments          |
| Household          | HouseholdLeadChildList      | Leads                |
| Household          | HouseholdNoteChildList      | Notes                |
| Household          | HouseholdOptyChildList      | Opportunities        |
| Household          | HouseholdPortfolioChildList | Portfolio            |
| Household          | HouseholdSRChildList        | Service Requests     |
| Household          | HouseholdTeamChildList      | Household Team       |
| Household          | Policy.ChildList            | Policies             |
| Household          | PolicyHolder.ChildList      | Policy Holders       |
| Household          | TaskOpenChildList           | Open Tasks           |
| InsuranceProperty  | Coverage.ChildList          | Coverages            |
| InsuranceProperty  | Damage.ChildList            | Damages              |
| Lead               | ActivityClosedChildList     | Completed Activities |
| Lead               | ActivityOpenChildList       | Open Activities      |
| Lead               | AppointmentOpenChildList    | Open Appointments    |
| Lead               | Audit Trail.ChildList       | Audit Trail          |
| Lead               | CustObj1ChildList           | Custom Objects 01    |
| Lead               | CustObj2ChildList           | Custom Objects 02    |
| Lead               | CustObj3ChildList           | Custom Objects 03    |
| Lead               | CustomObject10.ChildList    | Custom Objects 10    |
| Lead               | CustomObject11.ChildList    | Custom Objects 11    |
| Lead               | CustomObject12.ChildList    | Custom Objects 12    |
| Lead               | CustomObject13.ChildList    | Custom Objects 13    |
| Lead               | CustomObject14.ChildList    | Custom Objects 14    |
| Lead               | CustomObject15.ChildList    | Custom Objects 15    |
| Lead               | CustomObject4.ChildList     | Custom Objects 04    |
| Lead               | CustomObject5.ChildList     | Custom Objects 05    |
| Lead               | CustomObject6.ChildList     | Custom Objects 06    |
| Lead               | CustomObject7.ChildList     | Custom Objects 07    |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id            | Child Applet Name          |
|--------------------|----------------------------|----------------------------|
| Lead               | CustomObject8.ChildList    | Custom Objects 08          |
| Lead               | CustomObject9.ChildList    | Custom Objects 09          |
| Lead               | DealRegistration.ChildList | Deal Registrations         |
| Lead               | LeadBookChildList          | Books                      |
| Lead               | LeadEvent.ChildList        | Lead Event                 |
| Lead               | LeadFACHildList            | Attachments                |
| Lead               | LeadPartnerChildList       | Lead Partners              |
| Lead               | LeadQualScriptChildList    | Lead Qualification Scripts |
| Lead               | LeadTeam.ChildList         | Lead Teams                 |
| Lead               | TaskOpenChildList          | Open Tasks                 |
| MDFRequest         | Activity.ChildList         | Activities                 |
| MDFRequest         | ActivityClosedChildList    | Completed Activities       |
| MDFRequest         | AppointmentOpenChildList   | Open Appointments          |
| MDFRequest         | Audit Trail.ChildList      | Audit Trail                |
| MDFRequest         | Custom Object 1.ChildList  | Custom Objects 01          |
| MDFRequest         | Custom Object 2.ChildList  | Custom Objects 02          |
| MDFRequest         | Custom Object 3.ChildList  | Custom Objects 03          |
| MDFRequest         | CustomObject10.ChildList   | Custom Objects 10          |
| MDFRequest         | CustomObject11.ChildList   | Custom Objects 11          |
| MDFRequest         | CustomObject12.ChildList   | Custom Objects 12          |
| MDFRequest         | CustomObject13.ChildList   | Custom Objects 13          |
| MDFRequest         | CustomObject14.ChildList   | Custom Objects 14          |
| MDFRequest         | CustomObject15.ChildList   | Custom Objects 15          |
| MDFRequest         | CustomObject4.ChildList    | Custom Objects 04          |
| MDFRequest         | CustomObject5.ChildList    | Custom Objects 05          |
| MDFRequest         | CustomObject6.ChildList    | Custom Objects 06          |
| MDFRequest         | CustomObject7.ChildList    | Custom Objects 07          |
| MDFRequest         | CustomObject8.ChildList    | Custom Objects 08          |
| MDFRequest         | CustomObject9.ChildList    | Custom Objects 09          |
| MDFRequest         | MDFRequest Book.ChildList  | Books                      |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                | Child Applet Name       |
|--------------------|--------------------------------|-------------------------|
| MDFRequest         | MDFRequestAttachment.ChildList | MDF Request Attachments |
| MDFRequest         | MDFRequestTeam.ChildList       | MDF Request Teams       |
| MDFRequest         | TaskOpenChildList              | Open Tasks              |
| MedEdEvent         | AccountEvent.ChildList         | Account Event           |
| MedEdEvent         | ActivityClosedChildList        | Completed Activities    |
| MedEdEvent         | ActivityOpenChildList          | Open Activities         |
| MedEdEvent         | AppointmentOpenChildList       | Open Appointments       |
| MedEdEvent         | Audit Trail.ChildList          | Audit Trail             |
| MedEdEvent         | Campaign.ChildList             | Campaigns               |
| MedEdEvent         | CRMODLS_BusinessPlan.ChildList | Business Plans          |
| MedEdEvent         | CRMODLS_OBJECTIVE.ChildList    | Objectives              |
| MedEdEvent         | CustObj1ChildList              | Custom Objects 01       |
| MedEdEvent         | CustObj2ChildList              | Custom Objects 02       |
| MedEdEvent         | CustObj3ChildList              | Custom Objects 03       |
| MedEdEvent         | CustomObject10.ChildList       | Custom Objects 10       |
| MedEdEvent         | CustomObject11.ChildList       | Custom Objects 11       |
| MedEdEvent         | CustomObject12.ChildList       | Custom Objects 12       |
| MedEdEvent         | CustomObject13.ChildList       | Custom Objects 13       |
| MedEdEvent         | CustomObject14.ChildList       | Custom Objects 14       |
| MedEdEvent         | CustomObject15.ChildList       | Custom Objects 15       |
| MedEdEvent         | CustomObject4.ChildList        | Custom Objects 04       |
| MedEdEvent         | CustomObject5.ChildList        | Custom Objects 05       |
| MedEdEvent         | CustomObject6.ChildList        | Custom Objects 06       |
| MedEdEvent         | CustomObject7.ChildList        | Custom Objects 07       |
| MedEdEvent         | CustomObject8.ChildList        | Custom Objects 08       |
| MedEdEvent         | CustomObject9.ChildList        | Custom Objects 09       |
| MedEdEvent         | Fund.ChildList                 | Funds                   |
| MedEdEvent         | LeadEvent.ChildList            | Lead Event              |
| MedEdEvent         | MedEdFACHildList               | Attachments             |
| MedEdEvent         | MedEdInviteeChildList          | Invitees                |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                     | Child Applet Name       |
|--------------------|-------------------------------------|-------------------------|
| MedEdEvent         | OpportunityEvent.ChildList          | Opportunity Event       |
| MedEdEvent         | Pharma ME Event Book.ChildList      | Books                   |
| MedEdEvent         | Pharma ME EventTeam.ChildList       | Event Teams             |
| MedEdEvent         | TaskOpenChildList                   | Open Tasks              |
| MedEdInvitee       | InviteeAuditTrailChildList          | Audit Trail             |
| Opportunity        | ActivityClosedChildList             | Completed Activities    |
| Opportunity        | ActivityOpenChildList               | Open Activities         |
| Opportunity        | AppointmentOpenChildList            | Open Appointments       |
| Opportunity        | ContactRoleChildList                | Contacts                |
| Opportunity        | CRMODLS_PlanOpportunities.ChildList | Plan Opportunities      |
| Opportunity        | CustObj1ChildList                   | Custom Objects 01       |
| Opportunity        | CustObj2ChildList                   | Custom Objects 02       |
| Opportunity        | CustObj3ChildList                   | Custom Objects 03       |
| Opportunity        | CustomObject10.ChildList            | Custom Objects 10       |
| Opportunity        | CustomObject11.ChildList            | Custom Objects 11       |
| Opportunity        | CustomObject12.ChildList            | Custom Objects 12       |
| Opportunity        | CustomObject13.ChildList            | Custom Objects 13       |
| Opportunity        | CustomObject14.ChildList            | Custom Objects 14       |
| Opportunity        | CustomObject15.ChildList            | Custom Objects 15       |
| Opportunity        | CustomObject4.ChildList             | Custom Objects 04       |
| Opportunity        | CustomObject5.ChildList             | Custom Objects 05       |
| Opportunity        | CustomObject6.ChildList             | Custom Objects 06       |
| Opportunity        | CustomObject7.ChildList             | Custom Objects 07       |
| Opportunity        | CustomObject8.ChildList             | Custom Objects 08       |
| Opportunity        | CustomObject9.ChildList             | Custom Objects 09       |
| Opportunity        | DealRegistration.ChildList          | Deal Registrations      |
| Opportunity        | LeadChildList                       | Leads                   |
| Opportunity        | Opportunity.SelfChildList           | Sub-Opportunities       |
| Opportunity        | OpportunityBookChildList            | Books                   |
| Opportunity        | OpportunityCompetitorChildList      | Opportunity Competitors |
| Opportunity        | OpportunityEvent.ChildList          | Opportunity Event       |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id               | Child Applet Name            |
|--------------------|-------------------------------|------------------------------|
| Opportunity        | OpportunityFACHildList        | Attachments                  |
| Opportunity        | OpportunityPartnerChildList   | Opportunity Partners         |
| Opportunity        | OpportunityTeamChildList      | Opportunity Team             |
| Opportunity        | OpptyAssessmentChildList      | Opportunity Assessments      |
| Opportunity        | OpptyAuditTrailChildList      | Audit Trail                  |
| Opportunity        | OptyNoteChildList             | Notes                        |
| Opportunity        | OracleSocialNetwork.ChildList | Social                       |
| Opportunity        | Order.ChildList               | Orders                       |
| Opportunity        | ProductRevenueChildList       | Opportunity Product Revenues |
| Opportunity        | Quote.ChildList               | Quotes                       |
| Opportunity        | SPRequest.ChildList           | Special Pricing Requests     |
| Opportunity        | SRChildList                   | Service Requests             |
| Opportunity        | TaskOpenChildList             | Open Tasks                   |
| Order              | Custom Object 1.ChildList     | Custom Objects 01            |
| Order              | Custom Object 2.ChildList     | Custom Objects 02            |
| Order              | Custom Object 3.ChildList     | Custom Objects 03            |
| Order              | CustomObject10.ChildList      | Custom Objects 10            |
| Order              | CustomObject11.ChildList      | Custom Objects 11            |
| Order              | CustomObject12.ChildList      | Custom Objects 12            |
| Order              | CustomObject13.ChildList      | Custom Objects 13            |
| Order              | CustomObject14.ChildList      | Custom Objects 14            |
| Order              | CustomObject15.ChildList      | Custom Objects 15            |
| Order              | CustomObject4.ChildList       | Custom Objects 04            |
| Order              | CustomObject5.ChildList       | Custom Objects 05            |
| Order              | CustomObject6.ChildList       | Custom Objects 06            |
| Order              | CustomObject7.ChildList       | Custom Objects 07            |
| Order              | CustomObject8.ChildList       | Custom Objects 08            |
| Order              | CustomObject9.ChildList       | Custom Objects 09            |
| Order              | Order Book.ChildList          | Books                        |
| Order              | OrderItem.ChildList           | Order Items                  |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                | Child Applet Name      |
|--------------------|--------------------------------|------------------------|
| Order              | OrderTeam.ChildList            | Order Teams            |
| OrderItem          | Custom Object 1.ChildList      | Custom Objects 01      |
| OrderItem          | Custom Object 2.ChildList      | Custom Objects 02      |
| OrderItem          | Custom Object 3.ChildList      | Custom Objects 03      |
| OrderItem          | CustomObject10.ChildList       | Custom Objects 10      |
| OrderItem          | CustomObject11.ChildList       | Custom Objects 11      |
| OrderItem          | CustomObject12.ChildList       | Custom Objects 12      |
| OrderItem          | CustomObject13.ChildList       | Custom Objects 13      |
| OrderItem          | CustomObject14.ChildList       | Custom Objects 14      |
| OrderItem          | CustomObject15.ChildList       | Custom Objects 15      |
| OrderItem          | CustomObject4.ChildList        | Custom Objects 04      |
| OrderItem          | CustomObject5.ChildList        | Custom Objects 05      |
| OrderItem          | CustomObject6.ChildList        | Custom Objects 06      |
| OrderItem          | CustomObject7.ChildList        | Custom Objects 07      |
| OrderItem          | CustomObject8.ChildList        | Custom Objects 08      |
| OrderItem          | CustomObject9.ChildList        | Custom Objects 09      |
| Partner            | AccreditationRequest.ChildList | Accreditation Requests |
| Partner            | ActivityClosedChildList        | Completed Activities   |
| Partner            | ActivityOpenChildList          | Open Activities        |
| Partner            | Application.ChildList          | Applications           |
| Partner            | AppointmentOpenChildList       | Open Appointments      |
| Partner            | Audit Trail.ChildList          | Audit Trail            |
| Partner            | BrokerProfile.ChildList        | Broker Profiles        |
| Partner            | CourseEnrollment.ChildList     | Course Enrollments     |
| Partner            | CoursePartner.ChildList        | Course Partners        |
| Partner            | CRMODLS_BusinessPlan.ChildList | Business Plans         |
| Partner            | CustObj1ChildList              | Custom Objects 01      |
| Partner            | CustObj2ChildList              | Custom Objects 02      |
| Partner            | CustObj3ChildList              | Custom Objects 03      |
| Partner            | CustomObject10.ChildList       | Custom Objects 10      |
| Partner            | CustomObject11.ChildList       | Custom Objects 11      |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                  | Child Applet Name          |
|--------------------|----------------------------------|----------------------------|
| Partner            | CustomObject12.ChildList         | Custom Objects 12          |
| Partner            | CustomObject13.ChildList         | Custom Objects 13          |
| Partner            | CustomObject14.ChildList         | Custom Objects 14          |
| Partner            | CustomObject15.ChildList         | Custom Objects 15          |
| Partner            | CustomObject4.ChildList          | Custom Objects 04          |
| Partner            | CustomObject5.ChildList          | Custom Objects 05          |
| Partner            | CustomObject6.ChildList          | Custom Objects 06          |
| Partner            | CustomObject7.ChildList          | Custom Objects 07          |
| Partner            | CustomObject8.ChildList          | Custom Objects 08          |
| Partner            | CustomObject9.ChildList          | Custom Objects 09          |
| Partner            | DealRegistration.ChildList       | Deal Registrations         |
| Partner            | ExamPartner.ChildList            | Exam Partners              |
| Partner            | ExamRegistration.ChildList       | Exam Registrations         |
| Partner            | Fund Request.ChildList           | Fund Requests              |
| Partner            | MDFRequest.ChildList             | MDF Requests               |
| Partner            | Partner Book.ChildList           | Books                      |
| Partner            | PartnerAccountChildList          | Partner Accounts           |
| Partner            | PartnerAddress.ChildList         | Addresses                  |
| Partner            | PartnerAttachmentList            | Attachments                |
| Partner            | PartnerBookChildList             | Partner Organization Books |
| Partner            | PartnerCampaign.PartnerChildList | Partner Campaigns          |
| Partner            | PartnerContactChildListApplet    | Contacts                   |
| Partner            | PartnerFundChildList             | Partner Funds              |
| Partner            | PartnerLeadChildList             | Partner Leads              |
| Partner            | PartnerNoteChildList             | Notes                      |
| Partner            | PartnerOpportunityChildList      | Partner Opportunities      |
| Partner            | PartnerPlan.PartnerChildList     | Partner Plans              |
| Partner            | PartnerProgramChildList          | Program Memberships        |
| Partner            | PartnerRelationshipChildList     | Partner Relationships      |
| Partner            | PartnerRoleChildList             | Partner User Roles         |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id           | Child Applet Name                |
|--------------------|---------------------------|----------------------------------|
| Partner            | PartnerTeam.ChildList     | Partner Teams                    |
| Partner            | PartnerType.ChildList     | Partner Types                    |
| Partner            | Policy.Carrier.ChildList  | Policy: Carrier                  |
| Partner            | Policy.ChildList          | Policies                         |
| Partner            | Service Request.ChildList | Service Requests                 |
| Partner            | SPPartner.ChildList       | Partner Special Pricing Requests |
| Partner            | SPRequest.ChildList       | Special Pricing Requests         |
| Partner            | TaskOpenChildList         | Open Tasks                       |
| PartnerType        | Partner.ChildList         | Partners                         |
| Patient            | PatientAssetChildList     | Assets                           |
| Patient            | PatientContactChildList   | Relationships                    |
| Patient            | PatientNoteChildList      | Notes                            |
| Patient            | PatientTeamChildList      | Patient Team                     |
| Policy             | Activity.ChildList        | Activities                       |
| Policy             | ActivityClosedChildList   | Completed Activities             |
| Policy             | AppointmentOpenChildList  | Open Appointments                |
| Policy             | Audit Trail.ChildList     | Audit Trail                      |
| Policy             | Claim.ChildList           | Claims                           |
| Policy             | Coverage.ChildList        | Coverages                        |
| Policy             | Custom Object 1.ChildList | Custom Objects 01                |
| Policy             | Custom Object 2.ChildList | Custom Objects 02                |
| Policy             | Custom Object 3.ChildList | Custom Objects 03                |
| Policy             | CustomObject10.ChildList  | Custom Objects 10                |
| Policy             | CustomObject11.ChildList  | Custom Objects 11                |
| Policy             | CustomObject12.ChildList  | Custom Objects 12                |
| Policy             | CustomObject13.ChildList  | Custom Objects 13                |
| Policy             | CustomObject14.ChildList  | Custom Objects 14                |
| Policy             | CustomObject15.ChildList  | Custom Objects 15                |
| Policy             | CustomObject4.ChildList   | Custom Objects 04                |
| Policy             | CustomObject5.ChildList   | Custom Objects 05                |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id             | Child Applet Name    |
|--------------------|-----------------------------|----------------------|
| Policy             | CustomObject6.ChildList     | Custom Objects 06    |
| Policy             | CustomObject7.ChildList     | Custom Objects 07    |
| Policy             | CustomObject8.ChildList     | Custom Objects 08    |
| Policy             | CustomObject9.ChildList     | Custom Objects 09    |
| Policy             | InsuranceProperty.ChildList | Insurance Properties |
| Policy             | Lead.ChildList              | Leads                |
| Policy             | Opportunity.ChildList       | Opportunities        |
| Policy             | Policy Book.ChildList       | Books                |
| Policy             | Policy.SelfChildList        | Policies             |
| Policy             | PolicyAttachment.ChildList  | Policy Attachments   |
| Policy             | PolicyHolder.ChildList      | Policy Holders       |
| Policy             | Service Request.ChildList   | Service Requests     |
| Policy             | TaskOpenChildList           | Open Tasks           |
| Portfolio          | ActivityClosedChildList     | Completed Activities |
| Portfolio          | ActivityOpenChildList       | Open Activities      |
| Portfolio          | AppointmentOpenChildList    | Open Appointments    |
| Portfolio          | Audit Trail.ChildList       | Audit Trail          |
| Portfolio          | CustObj1ChildList           | Custom Objects 01    |
| Portfolio          | CustObj2ChildList           | Custom Objects 02    |
| Portfolio          | CustObj3ChildList           | Custom Objects 03    |
| Portfolio          | CustomObject10.ChildList    | Custom Objects 10    |
| Portfolio          | CustomObject11.ChildList    | Custom Objects 11    |
| Portfolio          | CustomObject12.ChildList    | Custom Objects 12    |
| Portfolio          | CustomObject13.ChildList    | Custom Objects 13    |
| Portfolio          | CustomObject14.ChildList    | Custom Objects 14    |
| Portfolio          | CustomObject15.ChildList    | Custom Objects 15    |
| Portfolio          | CustomObject4.ChildList     | Custom Objects 04    |
| Portfolio          | CustomObject5.ChildList     | Custom Objects 05    |
| Portfolio          | CustomObject6.ChildList     | Custom Objects 06    |
| Portfolio          | CustomObject7.ChildList     | Custom Objects 07    |
| Portfolio          | CustomObject8.ChildList     | Custom Objects 08    |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id               | Child Applet Name        |
|--------------------|-------------------------------|--------------------------|
| Portfolio          | CustomObject9.ChildList       | Custom Objects 09        |
| Portfolio          | FinancialAccount.ChildList    | Financial Accounts       |
| Portfolio          | FinancialPlan.ChildList       | Financial Plans          |
| Portfolio          | PortfolioBookChildList        | Books                    |
| Portfolio          | PortfolioContactChildList     | Contacts                 |
| Portfolio          | PortfolioSubAccountsChildList | Portfolio Sub-Accounts   |
| Portfolio          | PortfolioTeamChildList        | Portfolio Team           |
| Portfolio          | TaskOpenChildList             | Open Tasks               |
| PriceList          | Account.ChildList             | Accounts                 |
| PriceList          | Order.ChildList               | Orders                   |
| PriceList          | Partner.ChildList             | Partners                 |
| PriceList          | PriceListLineItem.ChildList   | Price List Line Items    |
| PriceList          | SPRequest.ChildList           | Special Pricing Requests |
| Product            | PriceListLineItem.ChildList   | Price List Line Items    |
| Program            | Application.ChildList         | Applications             |
| Program            | Audit Trail.ChildList         | Audit Trail              |
| Program            | CustomObject10.ChildList      | Custom Objects 10        |
| Program            | CustomObject11.ChildList      | Custom Objects 11        |
| Program            | CustomObject12.ChildList      | Custom Objects 12        |
| Program            | CustomObject13.ChildList      | Custom Objects 13        |
| Program            | CustomObject14.ChildList      | Custom Objects 14        |
| Program            | CustomObject15.ChildList      | Custom Objects 15        |
| Program            | CustomObject4.ChildList       | Custom Objects 04        |
| Program            | CustomObject5.ChildList       | Custom Objects 05        |
| Program            | CustomObject6.ChildList       | Custom Objects 06        |
| Program            | CustomObject7.ChildList       | Custom Objects 07        |
| Program            | CustomObject8.ChildList       | Custom Objects 08        |
| Program            | CustomObject9.ChildList       | Custom Objects 09        |
| Program            | DealRegistration.ChildList    | Deal Registrations       |
| Program            | Fund Request.ChildList        | Fund Requests            |
| Program            | MDFRequest.ChildList          | MDF Requests             |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name        | Child Applet Id               | Child Applet Name           |
|---------------------------|-------------------------------|-----------------------------|
| Program                   | Opportunity.ChildList         | Opportunities               |
| Program                   | ProgramAttachment.ChildList   | Partner Program Attachments |
| Program                   | ProgramBookChildList          | Books                       |
| Program                   | ProgramMembershipChildList    | Program Memberships         |
| Program                   | SPRequest.ChildList           | Special Pricing Requests    |
| Sales Assessment Template | AssessmentCriteriaChildList   | Criteria                    |
| SampleRequest             | Audit Trail.ChildList         | Audit Trail                 |
| SampleRequest             | SampleRequest Book.ChildList  | Books                       |
| SampleRequest             | SampleRequestItem.ChildList   | Sample Request Items        |
| SampleRequest             | SampleRequestTeam.ChildList   | Sample Request Teams        |
| SampleRequestItem         | Audit Trail.ChildList         | Audit Trail                 |
| Service Request           | ActivityClosedChildList       | Completed Activities        |
| Service Request           | ActivityOpenChildList         | Open Activities             |
| Service Request           | AppointmentOpenChildList      | Open Appointments           |
| Service Request           | CustObj1ChildList             | Custom Objects 01           |
| Service Request           | CustObj2ChildList             | Custom Objects 02           |
| Service Request           | CustObj3ChildList             | Custom Objects 03           |
| Service Request           | CustomObject10.ChildList      | Custom Objects 10           |
| Service Request           | CustomObject11.ChildList      | Custom Objects 11           |
| Service Request           | CustomObject12.ChildList      | Custom Objects 12           |
| Service Request           | CustomObject13.ChildList      | Custom Objects 13           |
| Service Request           | CustomObject14.ChildList      | Custom Objects 14           |
| Service Request           | CustomObject15.ChildList      | Custom Objects 15           |
| Service Request           | CustomObject4.ChildList       | Custom Objects 04           |
| Service Request           | CustomObject5.ChildList       | Custom Objects 05           |
| Service Request           | CustomObject6.ChildList       | Custom Objects 06           |
| Service Request           | CustomObject7.ChildList       | Custom Objects 07           |
| Service Request           | CustomObject8.ChildList       | Custom Objects 08           |
| Service Request           | CustomObject9.ChildList       | Custom Objects 09           |
| Service Request           | OracleSocialNetwork.ChildList | Social                      |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id               | Child Applet Name             |
|--------------------|-------------------------------|-------------------------------|
| Service Request    | Service RequestTeam.ChildList | Service Request Teams         |
| Service Request    | ServiceRequestBookChildList   | Books                         |
| Service Request    | ServiceRequestFACHildList     | Attachments                   |
| Service Request    | SolutionChildList             | Solutions                     |
| Service Request    | SRAuditTrailChildList         | Audit Trail                   |
| Service Request    | SRCallScriptChildList         | Call Scripts                  |
| Service Request    | SRCustSatSurveyChildList      | Customer Satisfaction Surveys |
| Service Request    | SRNoteChildList               | Notes                         |
| Service Request    | TaskOpenChildList             | Open Tasks                    |
| SharedAddress      | Account.ChildList             | Accounts                      |
| SharedAddress      | Audit Trail.ChildList         | Audit Trail                   |
| SharedAddress      | Channel Partner.ChildList     | Dealers                       |
| SharedAddress      | Contact.ChildList             | Contacts                      |
| SharedAddress      | Custom Object 1.ChildList     | Custom Objects 01             |
| SharedAddress      | Custom Object 2.ChildList     | Custom Objects 02             |
| SharedAddress      | Custom Object 3.ChildList     | Custom Objects 03             |
| SharedAddress      | CustomObject10.ChildList      | Custom Objects 10             |
| SharedAddress      | CustomObject11.ChildList      | Custom Objects 11             |
| SharedAddress      | CustomObject12.ChildList      | Custom Objects 12             |
| SharedAddress      | CustomObject13.ChildList      | Custom Objects 13             |
| SharedAddress      | CustomObject14.ChildList      | Custom Objects 14             |
| SharedAddress      | CustomObject15.ChildList      | Custom Objects 15             |
| SharedAddress      | CustomObject4.ChildList       | Custom Objects 04             |
| SharedAddress      | CustomObject5.ChildList       | Custom Objects 05             |
| SharedAddress      | CustomObject6.ChildList       | Custom Objects 06             |
| SharedAddress      | CustomObject7.ChildList       | Custom Objects 07             |
| SharedAddress      | CustomObject8.ChildList       | Custom Objects 08             |
| SharedAddress      | CustomObject9.ChildList       | Custom Objects 09             |
| SharedAddress      | Partner.ChildList             | Partners                      |
| SmartCall          | SmartCallBookChildList        | Books                         |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                  | Child Applet Name             |
|--------------------|----------------------------------|-------------------------------|
| SmartCall          | SmartCallProdDetailChildList     | Products Detailed             |
| SmartCall          | SmartCallPromItemDropChildList   | Promotional Items             |
| SmartCall          | SmartCallSampDropChildList       | Samples Dropped               |
| SocialMedia        | Service Request.ChildList        | Service Requests              |
| Solution           | AccreditationSolution.ChildList  | Accreditation Solutions       |
| Solution           | Audit Trail.ChildList            | Audit Trail                   |
| Solution           | CertificationSolution.ChildList  | Certification Solutions       |
| Solution           | CourseSolution.ChildList         | Course Solutions              |
| Solution           | CRMOD_LS_MessagingPlan.ChildList | Messaging Plans               |
| Solution           | CRMOD_LS_MsgPlanItem.ChildList   | Messaging Plan Items          |
| Solution           | CRMOD_LS_MsgPlnRel.ChildList     | Messaging Plan Item Relations |
| Solution           | CustObj1ChildList                | Custom Objects 01             |
| Solution           | CustObj2ChildList                | Custom Objects 02             |
| Solution           | CustObj3ChildList                | Custom Objects 03             |
| Solution           | CustomObject10.ChildList         | Custom Objects 10             |
| Solution           | CustomObject11.ChildList         | Custom Objects 11             |
| Solution           | CustomObject12.ChildList         | Custom Objects 12             |
| Solution           | CustomObject13.ChildList         | Custom Objects 13             |
| Solution           | CustomObject14.ChildList         | Custom Objects 14             |
| Solution           | CustomObject15.ChildList         | Custom Objects 15             |
| Solution           | CustomObject4.ChildList          | Custom Objects 04             |
| Solution           | CustomObject5.ChildList          | Custom Objects 05             |
| Solution           | CustomObject6.ChildList          | Custom Objects 06             |
| Solution           | CustomObject7.ChildList          | Custom Objects 07             |
| Solution           | CustomObject8.ChildList          | Custom Objects 08             |
| Solution           | CustomObject9.ChildList          | Custom Objects 09             |
| Solution           | ExamSolution.ChildList           | Exam Solutions                |
| Solution           | Solution Book.ChildList          | Books                         |
| Solution           | SolutionFACHildList              | Attachments                   |
| Solution           | SolutionRelatedChildList         | Related Solutions             |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id               | Child Applet Name                   |
|--------------------|-------------------------------|-------------------------------------|
| Solution           | SRChildList                   | Service Requests                    |
| SPRequest          | Activity.ChildList            | Activities                          |
| SPRequest          | ActivityClosedChildList       | Completed Activities                |
| SPRequest          | AppointmentOpenChildList      | Open Appointments                   |
| SPRequest          | Audit Trail.ChildList         | Audit Trail                         |
| SPRequest          | Custom Object 1.ChildList     | Custom Objects 01                   |
| SPRequest          | Custom Object 2.ChildList     | Custom Objects 02                   |
| SPRequest          | Custom Object 3.ChildList     | Custom Objects 03                   |
| SPRequest          | CustomObject10.ChildList      | Custom Objects 10                   |
| SPRequest          | CustomObject11.ChildList      | Custom Objects 11                   |
| SPRequest          | CustomObject12.ChildList      | Custom Objects 12                   |
| SPRequest          | CustomObject13.ChildList      | Custom Objects 13                   |
| SPRequest          | CustomObject14.ChildList      | Custom Objects 14                   |
| SPRequest          | CustomObject15.ChildList      | Custom Objects 15                   |
| SPRequest          | CustomObject4.ChildList       | Custom Objects 04                   |
| SPRequest          | CustomObject5.ChildList       | Custom Objects 05                   |
| SPRequest          | CustomObject6.ChildList       | Custom Objects 06                   |
| SPRequest          | CustomObject7.ChildList       | Custom Objects 07                   |
| SPRequest          | CustomObject8.ChildList       | Custom Objects 08                   |
| SPRequest          | CustomObject9.ChildList       | Custom Objects 09                   |
| SPRequest          | SPPartner.ChildList           | Partner Special Pricing Requests    |
| SPRequest          | SPRequest Book.ChildList      | Books                               |
| SPRequest          | SPRequestAttachment.ChildList | Special Pricing Request Attachments |
| SPRequest          | SPRequestLineItem.ChildList   | Special Pricing Products            |
| SPRequest          | SPRequestTeam.ChildList       | Special Pricing Request Teams       |
| SPRequest          | TaskOpenChildList             | Open Tasks                          |
| Task               | ActionContactChildList        | Contacts                            |
| Task               | ActionFACHildList             | Attachments                         |
| Task               | ActionUserChildList           | Users                               |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id                 | Child Applet Name           |
|--------------------|---------------------------------|-----------------------------|
| Task               | ActivityAssessmentChildList     | Activity Assessments        |
| Task               | ActivityBookChildList           | Books                       |
| Task               | Audit Trail.ChildList           | Audit Trail                 |
| Task               | CRMOD_LS_Transactions.ChildList | Sample Transactions         |
| Task               | CRMODLS_PCD_MSGRSP.ChildList    | Message Responses           |
| Task               | CRMODLS_Signature.ChildList     | Signature                   |
| Task               | CustObj1ChildList               | Custom Objects 01           |
| Task               | CustObj2ChildList               | Custom Objects 02           |
| Task               | CustObj3ChildList               | Custom Objects 03           |
| Task               | CustomObject10.ChildList        | Custom Objects 10           |
| Task               | CustomObject11.ChildList        | Custom Objects 11           |
| Task               | CustomObject12.ChildList        | Custom Objects 12           |
| Task               | CustomObject13.ChildList        | Custom Objects 13           |
| Task               | CustomObject14.ChildList        | Custom Objects 14           |
| Task               | CustomObject15.ChildList        | Custom Objects 15           |
| Task               | CustomObject4.ChildList         | Custom Objects 04           |
| Task               | CustomObject5.ChildList         | Custom Objects 05           |
| Task               | CustomObject6.ChildList         | Custom Objects 06           |
| Task               | CustomObject7.ChildList         | Custom Objects 07           |
| Task               | CustomObject8.ChildList         | Custom Objects 08           |
| Task               | CustomObject9.ChildList         | Custom Objects 09           |
| Task               | Fund Request.ChildList          | Fund Requests               |
| Task               | Order.ChildList                 | Orders                      |
| Task               | SampleRequest.ChildList         | Sample Requests             |
| UserAdmin          | AdminDelegatedFromChildList     | Delegated From Users        |
| UserAdmin          | AssignedBooksChildList          | Assigned Books              |
| UserAdmin          | Audit Trail.ChildList           | Audit Trail                 |
| UserAdmin          | DefaultBookObjChildList         | Default Book by Record Type |
| UserAdmin          | DelegateChildList               | Delegated To Users          |
| UserAdmin          | DTAuditHistoryChildList         | Audit                       |



Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id             | Child Applet Name     |
|--------------------|-----------------------------|-----------------------|
| UserAdmin          | LoginHistoryChildList       | Sign In History       |
| UserAdmin          | QuotaChildList              | Quotas                |
| UserAdmin          | UserDivision.ChildList      | User Divisions        |
| UserOwner          | Audit Trail.ChildList       | Audit Trail           |
| UserOwner          | DelegateChildList           | Delegated To Users    |
| UserOwner          | DelegatedFromChildList      | Delegated From Users  |
| UserOwner          | DTAuditHistoryChildList     | Audit                 |
| UserOwner          | LoginHistoryChildList       | Sign In History       |
| UserOwner          | QuotaChildList              | Quotas                |
| UserOwner          | UserDivision.ChildList      | User Divisions        |
| Vehicle            | Audit Trail.ChildList       | Audit Trail           |
| Vehicle            | Auto Vehicle Book.ChildList | Books                 |
| Vehicle            | CustObj1ChildList           | Custom Objects 01     |
| Vehicle            | CustObj2ChildList           | Custom Objects 02     |
| Vehicle            | CustObj3ChildList           | Custom Objects 03     |
| Vehicle            | CustomObject10.ChildList    | Custom Objects 10     |
| Vehicle            | CustomObject11.ChildList    | Custom Objects 11     |
| Vehicle            | CustomObject12.ChildList    | Custom Objects 12     |
| Vehicle            | CustomObject13.ChildList    | Custom Objects 13     |
| Vehicle            | CustomObject14.ChildList    | Custom Objects 14     |
| Vehicle            | CustomObject15.ChildList    | Custom Objects 15     |
| Vehicle            | CustomObject4.ChildList     | Custom Objects 04     |
| Vehicle            | CustomObject5.ChildList     | Custom Objects 05     |
| Vehicle            | CustomObject6.ChildList     | Custom Objects 06     |
| Vehicle            | CustomObject7.ChildList     | Custom Objects 07     |
| Vehicle            | CustomObject8.ChildList     | Custom Objects 08     |
| Vehicle            | CustomObject9.ChildList     | Custom Objects 09     |
| Vehicle            | Service Request.ChildList   | Service Requests      |
| Vehicle            | VehicleContactChildList     | Contacts              |
| Vehicle            | VehicleFinInfoChildList     | Financial Information |

Table 90. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

| Object System Name | Child Applet Id           | Child Applet Name |
|--------------------|---------------------------|-------------------|
| Vehicle            | VehicleSalesHistChildList | Sales History     |
| Vehicle            | VehicleServHistChildList  | Service History   |



# Troubleshooting Oracle Migration Tool On Demand

This appendix contains problem solving and troubleshooting information for Oracle Migration Tool On Demand client. It contains the following topics:

- [Auditing and Log Files on page 531](#)
- [Troubleshooting on page 532](#)

## Auditing and Log Files

All Web service operations in the customer test environment are audited. All successful operations as well as processing errors, such as Request Size exceeded, Invalid SOAP request, rate-limit error, and so on, are audited. You can find the audited records in the Web Services Utilization section in Oracle CRM On Demand (click Admin, and then Web Services Utilization).

You can view the Oracle Migration Tool On Demand client log files in the *Installation directory*\log directory, for example:

```
C:\Oracle Migration Tool On Demand\log
```

Any requests by the Oracle Migration Tool On Demand client are also captured in the Web Services Utilization section in Oracle CRM On Demand.

# Troubleshooting

Table 91 describes possible error conditions and their remedies.

Table 91. Error Messages and Conditions

| Error Message or Condition   | Cause  | Remedy  |
|--|--|---|
| <pre>&lt;java:string xmlns:java=""java.io""&gt;com.bea.xml.XmlRuntimeExce ption: error: cvc-maxLength-valid.1.1: string length (77) is greater than maxLength facet (75) for string75 in namespace.</pre>  | <p>A field's display name exceeds the maximum length allowed.</p>                            | <p>Review the display names specified and make sure none of them exceed the maximum length allowed.</p> |
| <pre>&lt;?xml version = '1.0' encoding = 'UTF-8'?&gt; &lt;env:Fault xmlns:xsi=""http://www.w3.org/2001/ XMLSchema-instance"" xmlns:env=""http:// schemas.xmlsoap.org/soap/envelope/"" xmlns:ns2=""urn:/crmondemand/xml/pagelayout/ pagelayoutrelatedinformation/query"" xmlns:xsd=""http://www.w3.org/2001/XMLSchema"" xmlns:ns1=""urn:/crmondemand/xml/pagelayout/ pagelayoutrelatedinformation/data"" xmlns:ns0=""urn:crmondemand/ws/odesabs/ pagelayout/pagelayoutrelatedinformation/ ""&gt;&lt;faultcode xmlns=""&gt;env:Server&lt;/ faultcode&gt;&lt;faultstring xmlns=""&gt;Invalid input value 'Cust related info for Contract' for 'RelatedInformationLayoutName'(SBL-ODS-50854)&lt;/ faultstring&gt;&lt;faultfactor xmlns=""/&gt;&lt;/env:Fault&gt;</pre> | <p>The related information page layout was not migrated before the upsert was performed.</p> | <p>Migrate the related information page layout before performing the upsert.</p>                        |

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