ORACLE CRM On Demand

Oracle Migration Tool On Demand Guide

Release 37

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1 What's New in This Release

What's New in Oracle Migration Tool On Demand Guide, Release 37

Table 1 lists the changes that were made in this version of the documentation to support Release 37 of the software.

Table 1. What's New in Oracle Migration Tool On Demand Guide Release 37

Topic	Description
"Elements and Sections in the Roles XML Output File" on page 192	Modified topic. This topic has been updated to include a description of the <LimitRecordsInListExport> element. This element allows you to optionally restrict the number of records that users who have a given role can export at one time when exporting records through the Export List menu option on List pages.
"Workflow Rules" on page 212 "Elements and Sections in the Workflow Rules Output File" on page 218	Modified topics. These topics have been updated to provide information about scheduled events. A *scheduled event* is a workflow rule that is automatically executed when a specified date and time is reached.
"Send Email Workflow Action Set" on page 226	Modified topic. This topic has been updated to include a description of the <ReplyToType> and <ReplyTo> elements. These elements allow you to specify the email address that automatically appears in the To field when an email recipient replies to an email that is sent by a Send Email workflow action.
"Access Objects and Corresponding Display Names" on page 341	Modified topic. Audit trail support has been added for a number of record types. The list of access objects has been updated to include the access objects for the new audit trail records.
"Child Applet IDs and Their Corresponding Names" on page 519	Modified topic. The list of child applets has been updated to include the new audit trail applets.

Additional Changes

This book also contains the following changes:

- "Privileges for Administrators" on page 20. The Manage Content privilege has been deleted from the list of privileges required for migrating role associations for folders.

- "Homepage Custom Web Applets" on page 104 and "Home Tab Custom Web Applets" on page 107. The information in these topics has been updated to indicate that although you can update or insert a record-type homepage custom report or a My Homepage custom report that contains a link to a report from the V2 catalog, the custom report configuration will be read-only in the user interface in the target environment, and the report will not display on a homepage even if the custom report is added to a homepage layout.
- Chapter 25, "Migrating Role Associations for Analytics Folders." This chapter has been updated as follows:
  - The chapter title has been changed. Previously this chapter was titled Migrating Role Associations for Report and Dashboard Folders.
  - Information about migrating role associations for V2 report folders has been removed.
  - The Manage Content privilege has been deleted from the list of privileges required for migrating role associations for folders.
- "Homepage Section Layout Mapping" on page 485. Report and Dashboard have been removed from the list of objects for which the Oracle Migration Tool On Demand client does not support homepage layout migration. The Report and Dashboard homepages are no longer applicable in Release 37.
- "Privilege IDs and Their Corresponding Names and Descriptions" on page 501. Notes have been added to the descriptions of the following privileges to indicate that they do not apply to V3 analytics. These privileges apply to V2 analytics only:
  - Manage Content
  - Access Analytics Dashboard
  - Access Analytics Reports

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 17
- Software Requirements for Installing Oracle Migration Tool On Demand on page 20
- Downloading the Oracle Migration Tool On Demand Client on page 28
- Installing and Configuring the Oracle Migration Tool On Demand Client on page 28
- Starting the Oracle Migration Tool On Demand Client on page 29
- Migration Dependencies on page 31
- Commands for Oracle Migration Tool On Demand on page 33
- Specifying Internet Proxy Server Information on page 36
- XML Templates and Web Services Description Language on page 37
- Considerations for Using the Oracle CRM On Demand Migration Tool Client on page 39

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
- Integration event queues
- 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 analytics 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 36 of Oracle CRM On Demand, then the configuration data that is returned for your requests is the configuration data that is available in Release 36 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 37 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 21 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, 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	■ Enable Web Services Access ■ Manage Roles and Access	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	■ Enable Web Services Access ■ Customize Application	None	None
Assignment Rule Groups and Assignment Rules	■ Enable Web Services Access ■ Data Rules and Assignment	None	None
Cascading Picklists	■ Enable Web Services Access ■ Customize Application	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	■ Enable Web Services Access ■ Customize Application	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)	■ Enable Web Services Access ■ Customize Application	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 Additional Notes and Requirements:
	Additional Notes and Requirements: ■ Field Management must be supported for the object. ■ The object must be set up for field renaming, if the operation is Upsert. ■ The object must be set up for new fields, if the operation is Create. ■ Advanced Field Management must be set up if the <ValidationErrorMsg>, <ValidationExpression>, or <PostDefault> elements are modified. ■ The Integration Tag can be changed only if renaming is allowed on that object. ■ A multi-select picklist can be created or updated only if it is set up for the object.		
Customized Record Types	■ Enable Web Services Access ■ Customize Application	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	■ Enable Web Services Access ■ Upload Client Side Extensions and Manage Custom HTML Head Tag	None	None
Custom Web Applets	■ Enable Web Services Access ■ Manage Custom Web Applets ■ Customize Application	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	■ Enable Web Services Access ■ Customize Application	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	■ Enable Web Services Access ■ Customize Application ■ Manage Roles and Access (for Read operations only)	None	None
Dynamic Page Layouts	■ Enable Web Services Access ■ Customize Application - Manage Dynamic Layout	None	None
Field Audit Setup	■ Enable Web Services Access ■ Administer Field Audit	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	■ Enable Web Services Access ■ Customize Application ■ 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.	None
Integration Event Queues	■ Enable Web Services Access ■ Manage Company	None	None
List Access and Order Layouts	■ Enable Web Services Access ■ Customize Application ■ Manage Public Lists	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)	■ Enable Web Services Access ■ Manage Modification Tracking ■ Manage Roles and Access	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	■ Enable Web Services Access ■ Customize Application	None	None
Picklists	■ Enable Web Services Access ■ Customize Application	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	■ Enable Web Services Access ■ Customize Application	None	None
Process Administration	■ Enable Web Services Access ■ Process Administration	None	None
Related Information Layouts	■ Enable Web Services Access ■ Customize Application	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
Role Associations for Analytics Folders (Report Folders)	■ Enable Web Services Access ■ Manage Roles and Access ■ Manage Custom Reports (to extract or update role associations for folders containing analyses) ■ Manage Dashboards (to extract or update role associations for folders under the predefined Dashboards folder) ■ Access Migrated Company Wide Shared Folder	None	The Access Migrated Company Wide Shared Folder privilege is required only if you want to extract, update, or insert role associations for the folders in the Migrated Company Wide Shared Folder.
Roles	■ Enable Web Services Access ■ Manage Roles and Access ■ Manage Company	None	The Manage Company privilege is required only if you want to update the <ExpirePassword In> element.
Sales Assessment Templates	■ Enable Web Services Access ■ Manage Assessments Access ■ Manage Content	None	None
Sales Categories	■ Enable Web Services Access ■ Manage Data Rules - Manage Sales Stage Definition	None	None

Table 2. Required Privileges for Customizing Configuration Data

Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
Search Layouts	■ Enable Web Services Access ■ Customize Application	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	■ Enable Web Services Access ■ Manage Data Rules - Manage Workflow Rules ■ Manage Data Rules - Manage Workflow Rules for Users ■ Workflow Cancel Save	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
Integration Event Queues	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 Admin Import privilege and the Admin 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 28. 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 19.

  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 36.

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

Table 4. A Recommended Sequence for Migrating Objects

Object	Dependencies	For More Information
Dynamic Page Layouts	Must be migrated after page layouts and before roles.	Chapter 18, "Migrating Dynamic Page Layouts"
Search Layouts	Must be migrated after fields and before roles.	Chapter 19, "Migrating Search Layouts"
Roles	Must be migrated after the following: ■ Access profiles ■ Page layouts ■ Search layouts Must be migrated before the following: ■ List access and order layouts ■ Role associations for analytics folders	Chapter 20, "Migrating Roles"
Integration Event Queues	Must be migrated before workflow rule action sets.	Chapter 21, "Migrating Integration Event Queue Configuration Data"
Workflow Rules	Must be migrated after fields and before workflow rule action sets.	Chapter 22, "Migrating Workflow Rules and Action Sets"
Workflow Rule Action Sets	Must be migrated after the following: ■ Workflow rules ■ Integration event queue configuration data	Chapter 22, "Migrating Workflow Rules and Action Sets"
Assignment Rules	Must be migrated after assignment rule groups.	Chapter 23, "Migrating Assignment Rule Groups and Assignment Rules"
List Access and Order Layouts	Must be migrated after roles.	Chapter 24, "Migrating List Access and Order Layouts"
Role Associations for Analytics Folders	Must be migrated after roles.	Chapter 25, "Migrating Role Associations for Analytics Folders"
Sales Categories	Must be migrated before process administration configuration data.	Chapter 28, "Migrating Sales Categories"
Process Administration	Must be migrated after sales categories and custom fields.	Chapter 30, "Migrating Process Administration Configuration Data"

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:

```
migrationtool -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, and describes the purpose of each command.

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. **NOTE:** The ReadAll command does not return preconfigured configuration data. It returns only the customized configuration data. In addition, for features that support translation, a read operation returns the translation values only for the languages for which translation values have been entered.
Read	The Read command exports a single set of configuration data of a specific type from an Oracle CRM On Demand server. **NOTE:** The Read command does not return preconfigured configuration data. It returns only the customized configuration data. In addition, for features that support translation, a read operation returns the translation values only for the languages for which translation values have been entered.
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.

Table 5. Oracle Migration Tool On Demand Client Command Names

Command Name	Description
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 workflow configuration. The workflow configuration data is provided in an input XML file that is specified in the command. **NOTE:** 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. **NOTE:** This command is supported only for custom Web tabs and workflow rules.
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. **NOTE:** 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
- IntegrationEventQueue
- ListAccessAndOrder
- PageLayoutField
- PageLayoutRelatedInformation
- PageLayoutSection
- Picklist
- PickValueGroup
- ProcessAdministration
- RelatedInformationLayout
- ReportFolder

  NOTE: The ReportFolder folder holds the output that is generated for the role associations for all analytics folders, including folders where analyses are stored and folders where dashboards are stored.

- 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 shows the parameters used to specify proxy server information.

Table 6. Parameters Used to Specify an Internet Proxy Server

Parameter	Description
-proxyserver *proxy_server*:[*port*]	Specifies the proxy server and the optional server port number to be used by the Oracle Migration Tool On Demand client.
-proxyid *proxy_server_userid*	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:

```
migrationtool -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 38.

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 39
- "Considerations for Character Encoding in Configuration Data" on page 39

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. In the Oracle Migration Tool On Demand client, the Mark for Translation functionality is supported only for the Sales Categories feature, and it works as follows:

- 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 *&*.
- Apostrophe ('). Encoded as *'*.
- Double quotation mark ("). Encoded as *"*.
- Left angle bracket (<). Encoded as *<*.
- A right angle bracket (>). Encoded as *>*.

To preserve the integrity of the XML content:

- The encoded ampersand (&) and left angle bracket (<) 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 & in the XML file. If you run the Upsert operation on the data from the XML file, then any & characters must be represented as & 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=siebel-dev
```

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

```
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=siebel-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 41
- Privileges Required for Migrating Customized Record Types on page 42
- Elements and Sections in the Customized Record Types XML Output File on page 42
- Migrating Customized Record Types on page 45

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. In the case of record types that support teams, you can also customize the record type to specify whether the previous owner of a record is retained in the team for the record after a new owner is assigned to the record.

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 45.

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

Command	Description
`Read CustomRecordType` *`SystemNameOfObject`*	This command exports the configuration information for a customized record type (object). *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll CustomRecordType`	This command exports the configuration information for all customized record types.
`Upsert CustomRecordType` *`CustomizedRecordTypeXML`*	This command updates or inserts configuration information for a specified record type.

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
<data:IncludeAll></data:IncludeAll>	<IncludeAll> specifies whether the preconfigured configuration information is returned in addition to the customized configuration information (true), or if only the customized configuration information is returned. The default setting is false.
<data:Name>Account</data:Name>	<Name> contains the system name of the record type (object), which never changes.
<data:SupportDisplayImage></data:SupportDisplayImage>	<SupportDisplayImage> corresponds to the Display Image check box in the UI, and is applicable for the Account, Contact, and Product record types only. It specifies whether an image can be displayed on the detail page for the record type (true) or an image cannot be displayed on the detail page for the record type.
<data:IconName>1801.gif</data:IconName>	<IconName> contains the file name of the classic theme icon used for the record type. For the list of available classic theme icon file names, see "Classic Theme Icons" on page 447.

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

Element or Section	Description
<data:ModernIconName>mod_servicehistory_25.png </data:ModernIconName>	<ModernIconName> contains the file name of the modern theme icon used for the record type. For the list of available modern theme icon file names, see "Modern Theme Icons" on page 459.
<data:AccessObjName>Account</data:AccessObjName>	<AccessObjName> contains the access object name of the record type that is being referenced, for example, Account. **NOTE:** This element is read-only.
<data:CustomizePreviousOwnerChannel>All Interactive Operations</data:CustomizePreviousOwnerChannel>	<CustomizePreviousOwnerChannel> specifies the circumstances in which the previous owner of a record is retained in the team on the record after a new owner is assigned to the record. The possible values include: ■ **Never Retain Owner.** The default value. The previous owner of the record will not be retained in the team. ■ **Always Retain Owner.** The previous owner of the record will be retained in the team, except when the owner is changed using the assignment manager. ■ **All Interactive Operations.** 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.
<data:CustomizePreviousOwnerAccessProfileId> 1QA2-HRM9N </data:CustomizePreviousOwnerAccessProfileId>	<CustomizePreviousOwnerAccessProfileId> contains the ID of the access profile that is given to the previous owner for the record, if the previous owner is retained in the team after a new owner is assigned to the record.
<data:CustomizePreviousOwnerAccessProfile>Full </data:CustomizePreviousOwnerAccessProfile>	<CustomizePreviousOwnerAccessProfile> contains the name of the access profile that is given to the previous owner for the record, if the previous owner is retained in the team after a new owner is assigned to the record.

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

Element or Section	Description
<data:ListOfCustomRecordTypeTranslations> . . . </data:ListOfCustomRecordTypeTranslations>	The <ListOfCustomRecordTypeTranslations> section contains the translation values for the record type.
<data:ListOfCustomRecordTypeTranslations> <data:CustomRecordTypeTranslation> <data:LanguageCode>ENU</data:LanguageCode> <data:SingularName>Account</data:SingularName> <data:PluralName>Accounts</data:PluralName> <data:ShortName>Acct</data:ShortName> </data:CustomRecordTypeTranslation> . . . </data:ListOfCustomRecordTypeTranslations>	The <CustomRecordTypeTranslation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter code for the language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <SingularName> contains the singular name for the record type in the language identified by the language code. ■ <PluralName> contains the plural name for the record type in the language identified by the language code. ■ <ShortName> contains the short name for the record type in the language identified by the language code. In this example, for English-American (ENU), the singular name is *Account,* the plural name is *Accounts,* and the short name is *Acct.* The precedence for determining the display name is as follows: **1** The translation definition, if it is defined. **2** The corresponding name element (<SingularName>, <PluralName>, <ShortName>) for the record type, if it is defined and if the translation definition is not defined. **3** The system name, if the translation definition and the corresponding name element for the record type are not defined.

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 45
- "Extracting All Customized Record Types" on page 46
- "Updating or Inserting a Customized Record Type (Upsert)" on page 46

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:

```
migrationtool -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 471.

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:

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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):

```
migrationtool -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:

```
migrationtool -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 49
- Privileges Required for Migrating Custom Web Tabs on page 50
- Elements and Sections in the Custom Web Tabs XML Output File on page 50
- Migrating Custom Web Tabs on page 52

Custom Web Tabs

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

NOTE: You cannot use the Oracle Migration Tool On Demand client to extract, update, or insert custom Web tabs of the Report type or the Dashboard type.

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 52.

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

Command	Description
`Read CustomWebTab` *`SystemNameOfCustomWebTab`*	This command exports a single custom Web tab. The generated *SystemNameOfCustomWebTab* is derived from the custom Web tab name provided by a user.
`ReadAll CustomWebTab`	This command exports all custom Web tabs.
`Upsert CustomWebTab` *`CustomWebTabXML`*	This command updates or inserts a custom Web tab, as required.
`Delete CustomWebTab` *`SystemNameOfCustomWebTab`*	This command deletes a single custom Web tab from the Oracle CRM On Demand server. The generated *SystemNameOfCustomWebTab* 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
<data:DisplayName>test</data:DisplayName>	<DisplayName> contains the name of the Web tab. This name is used in the user interface if no translated display names are provided.
<data:Description></data:Description>	<Description> contains the description for the custom Web tab.
<data:Type></data:Type>	<Type> defines the type of the custom Web tab, either URL or HTML.
<data:HTMLHeadAdditions></data:HTMLHeadAdditions>	<HTMLHeadAdditions> specifies the HTML code that is included in the source of a rendered Oracle CRM On Demand Web page in the <head> tags at the top of the page (for custom Web tabs of the HTML type only).
<data:WebTabHTML></data:WebTabHTML>	<WebTabHTML> specifies the HTML code that is rendered in a custom Web tab (for custom Web tabs of the HTML type only).
<data:Url></data:Url>	<URL> contains the URL information for the custom Web tab. **NOTE:** Although it is possible to update or insert a custom Web tab of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.

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

Element or Section	Description
<data:FrameHeight></data:FrameHeight>	<FrameHeight> specifies the frame height of the custom Web tab.
<data:FrameWidth></data:FrameWidth>	<FrameWidth> specifies the frame width of the custom Web tab.
<data:IconName>icon_custtab.gif</data:IconName>	<IconName> contains the file name of 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 Appendix C, "Classic and Modern Theme Icons".
<data:ListOfCustomWebTabTranslations> . . . </data:ListOfCustomWebTabTranslations>	The <ListOfCustomWebTabTranslations> section contains the translation values for the custom Web tab.
<data:ListOfCustomWebTabTranslations> <data:CustomWebTabTranslation> <data:LanguageCode>ENU</data:LanguageCode> <data:DisplayName>My Custom Web Tab</data:DisplayName> </data:CustomWebTabTranslation> . . . </data:ListOfCustomWebTabTranslations>	The <CustomWebTabTranslation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter code for the language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <DisplayName> contains the display name for the Web tab in the language identified by the language code. In this example, for English-American (ENU), the display name is *My Custom Web Tab*. The precedence for determining the display name is as follows: **1** The translation definition, if it is defined. **2** The information contained in the <DisplayName> element, if it is defined and if the translation definition is not defined. **3** The system name, if the translation definition and the <DisplayName> element are not defined.

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 52
- "Extracting All Custom Web Tabs" on page 53
- "Updating or Inserting a Custom Web Tab (Upsert)" on page 53

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:

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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):

```
migrationtool -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\MyCustomWwebTab.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:

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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 55
- Privileges Required for Migrating Custom Fields on page 56
- Elements and Sections in the Field Management XML Output File on page 56
- Migrating Custom Fields on page 61

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 61.

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

Command	Description
`Read FieldManagement` *`SystemNameOfObject`*	This command exports all customized and custom fields for a specific record type. *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll FieldManagement`	This command exports all customized and custom fields for all objects.
`Upsert FieldManagement` *`FieldManagementXML`*	This command updates or inserts a set of fields in a particular object, as required.
`Create FieldManagement` *`FieldManagementXML`*	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 471. 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
<data:IncludeAll>true </data:IncludeAll>	<IncludeAll> specifies whether the preconfigured configuration information is returned in addition to the customized configuration information (true), or if only the customized configuration information is returned. The default setting is false.

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

Element or Section	Description
<data:DefaultAddressField>true </data:DefaultAddressField>	When the <IncludeAll> element 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.
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:ListOfFields> . . . </data:ListOfFields>	The <ListOfFields> section contains all of the customized field definitions for the record type.
<data:ListOfFields> <data:Field> . . . </data:Field> . . . </data:ListOfFields>	The <Field> section contains all of the elements for a single field.
<data:Field> <data:Name>TEXTSM_001</data:Name> . . . </data:Field>	<Name> contains the system name of the field, which never changes.
<data:Field> . . . <data:DisplayName>My Custom Field </data:DisplayName> . . . </data:Field>	<DisplayName> contains the name that is used in the user interface, if no translated display names are provided.
<data:Field> . . . <data:FieldType>Text (Short)</data:FieldType> . . . </data:Field>	<FieldType> specifies the type of field.
<data:Field> . . . <data:IntegrationTag>stMy_Custom_Field </data:IntegrationTag> . . . </data:Field>	<IntegrationTag> contains the custom integration tag name of the field. This tag can be modified by Oracle CRM On Demand users. The default integration tag is of the format: *fieldtypeDisplay_Name* For example, stMy_Custom_Field is assigned to a custom field of type Text (Short) with the Display Name value of: My Custom Field.

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

Element or Section	Description
<data:Field> . . . <data:GenericIntegrationTag>CustomText32 </data:GenericIntegrationTag> . . . </data:Field>	<GenericIntegrationTag> 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. **NOTE:** For non-custom fields, the <GenericIntegrationTag> and the <IntegrationTag> values are the same.
<data:Field> . . . <data:Required>false</data:Required> . . . </data:Field>	<Required> specifies whether the field is a required field (true), or is not a required field (false). If a condition is specified in the <RequiredCondition> element, then the <Required> element must be set to false.
<data:Field> . . . <data:RequiredCondition> [{Type}]=LookupValue("ACCOUNT_TYPE","Customer") </data:RequiredCondition> . . . </data:Field>	<RequiredCondition> 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. If the <Required> element is set to true, then the <RequiredCondition> element must not contain a value.
<data:Field> . . . <data:Optimized>false</data:Optimized> . . . </data:Field>	<Optimized> 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 *Oracle CRM On Demand Online Help*.
<data:Field> . . . <data:ReadOnly>false</data:ReadOnly> . . . </data:Field>	<ReadOnly> determines if the field is a read-only field (true) or is not a read-only field (false).
<data:Field> . . . <data:DefaultValue></data:DefaultValue> . . . </data:Field>	<DefaultValue> contains the default value of the field, if one is defined.
<data:Field> . . . <data:FieldValidation></data:FieldValidation> . . . </data:Field>	<FieldValidation> contains the validation rules for the custom field, if any are defined.

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

Element or Section	Description
<data:Field> . . . <data:PostDefault>false</data:PostDefault> . . . </data:Field>	<PostDefault> specifies whether the field is prepopulated with the default value when a new record is being created. If the <PostDefault> 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.
<data:Field> . . . <data:DenormalizedControl>false </data:DenormalizedControl> . . . </data:Field>	<DenormalizedControl> corresponds to the Related Information check box in field management. For certain record types, you can create custom related information fields. For those 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 *Oracle CRM On Demand Online Help*.
<data:Field> . . . <data:DenormalizedAssociateControlName/> . . . </data:Field>	<DenormalizedAssociateControlName> corresponds to the Related Record Type picklist in field management.
<data:Field> . . . <data:DenormalizedControlName/> . . . </data:Field>	<DenormalizedControlName> corresponds to the Related Field picklist in field management.
<data:Field> . . . <data:ValidationErrorMsg> </data:ValidationErrorMsg> . . . </data:Field>	<ValidationErrorMsg> contains the error message that is displayed when a validation rule fails, if a message is defined.
<data:Field> . . . <data:ToolTipText></data:ToolTipText> . . . </data:Field>	<ToolTipText> contains the tooltip text that is displayed for the field in the Oracle CRM On Demand UI, if tooltip text is defined.
<data:Field> . . . <data:Description></data:Description> . . . </data:Field>	<Description> contains the description of the field.

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

Element or Section	Description
<data:Field> . . . <data:TooltipFormat>HTML</data:TooltipFormat> . . . </data:Field>	<TooltipFormat> specifies the format of the tooltip text, which can be HTML or Plain Text.
<data:Field> . . . <data:ListOfFieldTranslations> . . . </data:ListOfFieldTranslations> . . . </data:Field>	The <ListOfFieldTranslations> section contains the translation values for the field.
<data:Field> . . . <data:ListOfFieldTranslations> <data:FieldTranslation> <data:LanguageCode>ENU </data:LanguageCode> <data:DisplayName>Roles </data:DisplayName> <data:ValidationErrorMsg> </data:ValidationErrorMsg> <data:ToolTipText> </data:ToolTipText> <data:Description> </data:Description> </data:FieldTranslation> . . . </data:ListOfFieldTranslations> </data:Field>	The <FieldTranslation> section contains the translation values for one language. ■ <LanguageCode> contains the three-letter code for a language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <DisplayName> contains the display name for the field in the language identified by the language code. ■ <ValidationErrorMsg> contains the validation error message for the field in the language identified by the language code. ■ <ToolTipText> contains the tooltip text for the field in the language identified by the language code. ■ <Description> contains the description for the field in the language identified by the language code. The precedence for determining the display name is as follows: 1 The translation definition, if it is defined. 2 The information contained in the <DisplayName> element, if it is defined and if the translation definition is not defined. 3 The system name, if the translation definition and the <DisplayName> element are not defined.

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:DefaultValue></data:DefaultValue>
  <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 61
- “Extracting Customized Field Definitions for All Objects” on page 62
- “Updating or Inserting a Set of Field Definitions (Upsert)” on page 63
- “Creating a New Field Definition” on page 64

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:

```
migrationtool -u UserID -s ServerURL Read FieldManagement 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 471.

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:

```
migrationtool -u UserID -s ServerURL Read FieldManagement "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:

```
migrationtool -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:

```
migrationtool -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):

```
migrationtool -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

```
migrationtool -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:

```
migrationtool -u UserID -s ServerURL Create 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\MyAccountField.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:

```
migrationtool -u UserID -s ServerURL Create FieldManagement “C:\My
Files\MyAccountField.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 67
- Privileges Required for Migrating Picklist Values on page 67
- Elements and Sections in the Picklist XML Output File on page 68
- Migrating Picklist Values on page 69

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 69.

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

Command	Description
`Read Picklist` *`SystemNameOfObject`*	This command exports a set of picklist values for a specific record type (object). *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll Picklist`	This command exports all picklist values separated by the object name.
`Upsert Picklist` *`PicklistXML`*	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
<data:IncludeAll>true </data:IncludeAll>	<IncludeAll> specifies whether the preconfigured configuration information is returned in addition to the customized configuration information (true), or if only the customized configuration information is returned. The default setting is false.
<data:ObjectName>Account Team </data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:ListOfPicklists> . . . </data:ListOfPicklists>	The <ListOfPicklists> section contains the details of the picklists fields.
<data:Picklist> . . . </data:Picklist>	The <Picklist> section contains all of the elements for one picklist field.
<data:Picklist> <data:Name>Team Role</data:Name> . . . </data:Picklist>	<Name> contains the system name of the picklist field within the record type.
<data:Picklist> . . . <data:WebSvcTag>Team Role </data:WebSvcTag> . . . </data:Picklist>	<WebSvcTag> contains the Web Services v2.0 integration tag name for the field. This element is read-only and is ignored in Upsert operations.
<data:Picklist> . . . <data:ListOfPicklistValues> . . . </data:ListOfPicklistValues> . . . </data:Picklist>	The <ListOfPicklistValues> section contains the details of the picklist field values.

Table 15. Elements and Sections in the Picklist XML File

Element or Section	Description
<data:Picklist> . . . <data:ListOfPicklistValues> <data:PicklistValue> <data:ValueId>Executive Sponsor </data:ValueId> <data:Disabled>false</data:Disabled> . . . </data:PicklistValue> . . . </data:ListOfPicklistValues> . . . </data:Picklist>	The <PicklistValue> section contains the details of one picklist value: ■ <ValueId> is the identifier assigned to the specific picklist value. This element maps to the Id field in the Edit Picklist window for the picklist field. ■ <Disabled> specifies whether the value is disabled (true) or is not disabled (false).
<data:Picklist> . . . <data:ListOfPicklistValues> <data:PicklistValue> . . . <data:ListOfValueTranslations> . . . </data:ListOfValueTranslations> . . . </data:PicklistValue> . . . </data:ListOfPicklistValues> . . . </data:Picklist>	The <ListOfValueTranslations> section contains the translation values for the picklist value.
<data:Picklist> . . . <data:ListOfPicklistValues> <data:PicklistValue> . . . <data:ListOfValueTranslations> <data:ValueTranslation> <data:LanguageCode>ENU </data:LanguageCode> <data:Value>Executive Sponsor </data:Value> <data:Order>2</data:Order> </data:ValueTranslation> </data:ListOfValueTranslations> . . . </data:PicklistValue> . . . </data:ListOfPicklistValues> . . . </data:Picklist>	The <ValueTranslation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter code for a language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <Value> contains the picklist value in the language identified by the language code. ■ <Order> specifies the order for the picklist value within the set of picklist values in the specified language.

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 70
- "Extracting Picklist Values for a Single Picklist Field" on page 70
- "Extracting All Picklist Values for All Objects" on page 71

■ "Updating or Inserting a Set of Picklist Values for a Single Object (Upsert)" on page 72

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:

```
migrationtool -u UserID -s ServerURL Read Picklist 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 picklists, for example, Account. The system names for the record types are listed in "System Names for Record Types" on page 471.

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:

```
migrationtool -u UserID -s ServerURL Read Picklist Account
```

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

Extracting Picklist Values for a Single Picklist Field

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

To extract the picklist values for 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 system name of the record type (object), which never changes, for example, Account.
- *PickListName* is the system name of the picklist field for which you want to extract the values.

  NOTE: If you do not know the system name of a customized or custom picklist field, then run the Read FieldManagement command for the record type. In the output file from that command, the <Name> element shows the system name of the field. As an example, PICK_000 is the system name of the first custom picklist field that is created for the Account record type. For more information about the Read FieldManagement command, see "Custom Fields" on page 55.

If you want to extract only the picklist values that are active (that is, the picklist values that are not marked as disabled), then include the <Disabled> argument in the input XML file for the Read Picklist command and set the value of the argument to false.

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

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

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

```
migrationtool -u UserID -s ServerURL Read Picklist "C:\My
Files\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:

```
migrationtool -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:

```
migrationtool -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):

```
migrationtool -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:

```
migrationtool -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 73
- Privileges Required for Migrating Picklist Value Groups on page 74
- Elements and Sections in the Picklist Value Groups XML Output File on page 74
- Migrating Picklist Value Groups on page 75

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 75.

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

Command	Description
`Read PickValueGroup` *`PickValueGroupName`*	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` *`PickValueGroupXML`*	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>`	<PicklistValueGroupName> contains the case-sensitive system name of the picklist value group.
`<data:Description>PVG description</data:Description>`	<Description> contains the description for the picklist value group.

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

Element or Section	Description
<data:PickValueGroupId>1QA2-NX0XH</data:PickValueGroupId>	<PickValueGroupID> contains the row ID of the picklist value group.
<data:ListOfPicklistTypeSet> . . . </data:ListOfPicklistTypeSet>	The <ListOfPicklistTypeSet> section contains details of the picklist values that are mapped to the picklist value group.
<data:ListOfPicklistTypeSet> <data:PicklistTypeSet> <data:ObjectName>Account</data:ObjectName> <data:FieldName>Type </data:FieldName> <data:ListOfLicNameSet> <data:LicNameSet> <data:LicName>Customer </data:LicName> <data:LicNameSet> <data:LicName>Competitor </data:LicName> . . . </data:LicNameSet> . . . </data:ListOfLicNameSet> . . . </data:PicklistTypeSet> . . . </data:ListOfPicklistTypeSet>	The <PicklistTypeSet> section contains details of the mapped picklist values from one picklist field, as follows: ■ <ObjectName> contains the system name of the record type to which the picklist field belongs. ■ <FieldName> contains the system name of the picklist field. ■ The <ListOfLicNameSet> section contains the details of the values from this picklist field that are mapped to the picklist value group. Each <LicName> element contains the language-independent name of a single picklist value.

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 75

■ "Extracting All Picklist Value Groups" on page 76

■ "Updating or Inserting a Picklist Value Group" on page 76

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

`migrationtool -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:

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

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).

```
migrationtool -u UserID -s ServerURL Upsert PickValueGroup PickValueGroupXML
```

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 Files\MyAccountPicklistValueGroup.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 79
- Privileges Required for Migrating Cascading Picklists on page 79
- Elements and Sections in the Cascading Picklist XML Output File on page 80
- Migrating Cascading Picklists on page 81

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 81.

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

Command	Description
`Read CascadingPicklist` *`SystemNameOfObject`*	This command exports the values for all cascading picklists for a specific record type (object). *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll CascadingPicklist`	This command exports all cascading picklists for all of the objects set up for the user running the Oracle Migration Tool On Demand client.
`Upsert CascadingPicklist` *`CascadingPicklistXML`*	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
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:ListOfCascadingPicklist> . . . </data:ListOfCascadingPicklist>	The <ListOfCascadingPicklist> contains all of the cascading picklist definitions for the record type.
<data:CascadingPicklist> . . . </data:CascadingPicklist>	The <CascadingPicklist> section contains all of the details for a cascading picklist.
<data:CascadingPicklist> <data:ParentPicklist>Organization Relationship</data:ParentPicklist> . . . </data:CascadingPicklist>	<ParentPicklist> contains the parent picklist.
<data:CascadingPicklist> . . . <data:RelatedPicklist>Region </data:RelatedPicklist> . . . </data:CascadingPicklist>	<RelatedPicklist> contains the related picklist.
<data:CascadingPicklist> . . . <data:Description></data:Description> . . . </data:CascadingPicklist>	<Description> contains the description of the cascading picklist.
<data:CascadingPicklist> . . . <data:ListOfPicklistValueAssociations> . . . </data:ListOfPicklistValueAssociations> </data:CascadingPicklist>	The <ListOfPicklistValueAssociations> section contains all of the associations for the cascading picklist.

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

Element or Section	Description
<data:CascadingPicklist> . . . <data:ListOfPicklistValueAssociations> <data:PicklistValueAssociations> <data:ParentPicklistValue>IHN </data:ParentPicklistValue> <data:RelatedPicklistValue>East </data:RelatedPicklistValue> <data:RelatedPicklistValue>West </data:RelatedPicklistValue> </data:PicklistValueAssociations> . . . </data:ListOfPicklistValueAssociations> </data:CascadingPicklist>	The <PicklistValueAssociations> section contains the details of the associations for a single value from the parent picklist: ■ <ParentPicklistValue> contains the parent picklist value. ■ <RelatedPicklistValue> contains a related picklist value. There is one <RelatedPicklistValue> element for each value in the related picklist that is associated with the <ParentPicklistValue>.

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 81
- "Extracting Cascading Picklists for All Objects" on page 82
- "Updating or Inserting a Cascading Picklist (Upsert)" on page 83

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:

```
migrationtool -u UserID -s ServerURL Read CascadingPicklist 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 471.

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:

```
migrationtool -u UserID -s ServerURL Read CascadingPicklist 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:

```
migrationtool -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:

```
migrationtool -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.

About the Upsert Operation

The `Upsert` command inserts or updates a cascading picklist based on the <ParentPicklist> and <RelatedPicklist> values. If a cascading picklist already exists with the same <ParentPicklist> and <RelatedPicklist> values, then an update occurs, otherwise, a new cascading picklist is inserted.

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

- The parent picklist is the same as the 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 already referenced by another related 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):

```
migrationtool -u UserID -s ServerURL Upsert CascadingPicklist CascadingPicklistXML
```

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 Files\My CascadingPicklist.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:

```
migrationtool -u UserID -s ServerURL Upsert CascadingPicklist "C:\My Files\My
CascadingPicklist.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 85
- Privileges Required for Migrating Custom Web Link Fields on page 85
- Elements and Sections in the Custom Web Links XML Output File on page 86
- Migrating Custom Web Link Fields on page 88

Custom Web Link Fields

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

NOTE: You cannot use the Oracle Migration Tool On Demand client to extract, update, or insert custom Web link fields of the Report type or the Dashboard type.

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 88.

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

Command	Description
`Read CustomWebLink` *`SystemNameOfObject`*	This command exports all custom Web link fields for a specific record type (object). *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll CustomWebLink`	This command exports all custom Web link fields for all objects.
`Upsert CustomWebLink` *`CustomWebLinkXML`*	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
<data:ObjectName>Account </data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:ListOfWebLinks> . . . </data:ListOfWebLinks>	The <ListOfWebLinks> section contains details of the custom Web links.
<data:WebLink> . . . </data:WebLink>	The <WebLink> section contains details of one custom Web link.
<data:WebLink> <data:Name>MyWebLink</data:Name> . . . </data:WebLink>	<Name> contains the system name of the custom Web link.
<data:WebLink> . . . <data:IntegrationTag>My_Web_Link </data:IntegrationTag> . . . </data:WebLink>	<IntegrationTag> contains the custom language-independent integration tag for the custom Web link.
<data:WebLink> . . . <data:DisplayText>MyDisplayText </data:DisplayText> . . . </data:WebLink>	<DisplayText> contains the display text that appears in the custom Web link field.

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

Element or Section	Description
<data:WebLink> . . . <data:WebLinkTarget>Open in Custom Tab </data:WebLinkTarget> . . . </data:WebLink>	<WebLinkTarget> specifies the behavior when a user clicks the link. This element can have the following values: ■ **Open in Current window.** If this value is specified, then in the UI, the linked page opens in the current window. ■ **Open in New window.** If this value is specified, then in the UI, the linked page opens in a new window. ■ **Open in Custom Tab.** If this value is specified, then in the UI, the linked page opens in a custom tab.
<data:WebLink> . . . <data:TargetCustomWebTab>MyCustomWebTab </data:TargetCustomWebTab> . . . </data:WebLink>	<TargetCustomWebTab> specifies the custom Web tab, if Open in Custom Tab is specified in <WebLinkTarget>.
<data:WebLink> . . . <data:RefreshParentWindow>false </data:RefreshParentWindow> . . . </data:WebLink>	<RefreshParentWindow> specifies whether the parent window is refreshed after the user closes the new window in which the linked page opened (true). This element is applicable only if Open in New window is specified in <WebLinKTarget>.
<data:WebLink> . . . <data:DisplayOptions>B </data:DisplayOptions> . . . </data:WebLink>	<DisplayOptions> specifies the type of page in which the custom Web link can be displayed. This element can have the following values: ■ **D.** Detail pages only. ■ **E.** Edit pages only. ■ **B.** Both detail pages and edit pages.
<data:WebLink> . . . <data:ActiveLinkCondition>TRUE </data:ActiveLinkCondition> . . . </data:WebLink>	<ActiveLinkCondition> specifies the condition that controls whether the link is active on the detail and edit pages.
<data:WebLink> . . . <data:DisplayLinkCondition>TRUE </data:DisplayLinkCondition> . . . </data:WebLink>	<DisplayLinkCondition> specifies the condition that controls whether the link is displayed on the detail and edit pages.

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

Element or Section	Description
<data:WebLink> . . . <data:URL>http://www.someURL.com </data:URL> . . . </data:WebLink>	<URL> specifies the URL that is invoked when the user clicks the custom Web link. **NOTE:** Although it is possible to update or insert a custom Web link that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.
<data:WebLink> . . . <data:ListOfWebLinkTranslations> . . . </data:ListOfWebLinkTranslations> . . . </data:WebLink>	The <ListOfWebLinkTranslations> section contains the translation values for the custom Web link.
<data:WebLink> . . . <data:ListOfWebLinkTranslations> <data:WebLinkTranslation> <data:DisplayName>MyWebLink </data:DisplayName> <data:DisplayText>Click here </data:DisplayText> <data:LangCode>ENU</data:LangCode> </data:WebLinkTranslation> . . . </data:ListOfWebLinkTranslations> . . . </data:WebLink>	The <WebLinkTranslation> section contains the translation values for one language: ■ <DisplayName> contains the display name for the Web link field in the language identified by the language code. ■ <DisplayText> contains the display text for the Web link field in the language identified by the language code. ■ <LangCode> contains the three-letter code for a language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339.

NOTE: The Type field in the Edit Web Link page in the User Interface is not supported in Oracle Migration Tool On Demand client.

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 89

■ "Extracting Custom Web Link Fields for All Objects" on page 89

■ "Updating or Inserting Custom Web Link Fields (Upsert)" on page 90

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:

```
migrationtool -u UserID -s ServerURL Read CustomWebLink 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 custom Web links fields, for example, Account. The system names for the record types are listed in "System Names for Record Types" on page 471.

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:

```
migrationtool -u UserID -s ServerURL Read CustomWebLink 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:

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

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:

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

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):

```
migrationtool -u UserID -s ServerURL Upsert CustomWebLink CustomWebLinkXML
```

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 Files\MyCustomWebLink.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:

```
migrationtool -u UserID -s ServerURL Upsert CustomWebLink "C:\My
Files\MyCustomWebLink.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 91
- Privileges Required for Migrating Concatenated Fields on page 91
- Elements and Sections in the Concatenated Fields XML Output File on page 92
- Migrating Concatenated Fields on page 93

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 93.

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

Command	Description
`Read ConcatenatedField` *`SystemNameOfObject`*	This command exports all concatenated fields for a specific record type (object). *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll ConcatenatedField`	This command exports all concatenated fields for all objects.
`Upsert ConcatenatedField` *`ConcatenatedFieldXML`*	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
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:ListOfConcatenatedFields> . . . </data:ListOfConcatenatedFields	The <ListOfConcatenatedFields> section contains details of the concatenated fields.
<data:ConcatenatedField> . . . </data:ConcatenatedField>	The <ConcatenatedField> section contains details of one concatenated field.
<data:ConcatenatedField> <data:Name>ConcatenatedField</data:Name> . . . </data:ConcatenatedField>	<Name> contains the system name of the concatenated field.
<data:ConcatenatedField> <data:IntegrationTag>MyConcatenatedField </data:IntegrationTag> . . . </data:ConcatenatedField>	<IntegrationTag> contains the custom language-independent integration tag for the concatenated field.
<data:ConcatenatedField> <data:DisplayText>MyDisplayText </data:DisplayText> . . . </data:ConcatenatedField>	<DisplayText> contains the specification for the content of the concatenated field.

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

Element or Section	Description
<data:ConcatenatedField> <data:ListOfConcatenatedFieldTranslations> . . . </data:ListOfConcatenatedFieldTranslations> . . . </data:ConcatenatedField>	The <ListOfConcatenatedFieldTranslation> section contains the translation values for the concatenated field.
<data:ConcatenatedField> <data:ListOfConcatenatedFieldTranslations> <data:ConcatenatedFieldTranslation> <data:DisplayName>MyConcatenatedField </data:DisplayName> <data:DisplayText>Field 1 Field 2. </data:DisplayText> <data:LangCode>ENU</data:LangCode> </data:ConcatenatedFieldTranslation> . . . </data:ListOfConcatenatedFieldTranslations> . . . </data:ConcatenatedField>	The <ConcatenatedFieldTranslation> section contains the translation values for one language. ■ <DisplayName> contains the name for the concatenated field in the language identified by the language code. ■ <DisplayText> contains the specification for the content of the concatenated field, with the text that appears in the field in the language identified by the language code. ■ <LangCode> contains the three-letter code for the language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339.

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 93
- "Extracting Concatenated Fields for All Objects" on page 94
- "Updating or Inserting Concatenated Fields (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 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:

```
migrationtool -u UserID -s ServerURL Read ConcatenatedField 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 471.

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:

```
migrationtool -u UserID -s ServerURL Read ConcatenatedField 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:

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

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:\My Files\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:\My
Files\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 97
- Privileges Required for Migrating Custom Web Applets on page 98
- Elements and Sections in the Web Applet XML Output File on page 99
- Migrating Custom Web Applets on page 110

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*.

NOTE: You cannot use the Oracle Migration Tool On Demand client to extract, update, or insert custom Web applets of the Report type or the Dashboard type.

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 110.

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

Command	Description
`Read HomepageCustomWebApplet` *`SystemNameOfObject`* [*`HomePageWebAppletName`*]	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: ■ *SystemNameOfObject* is the specified record type. The system names for the record types are listed in "System Names for Record Types" on page 471. ■ *HomePageWebAppletName* is the name of a homepage custom Web applet.

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

Command	Description
`Read DetailPageCustomWebApplet` *`SystemNameOfObject`* [*`DetailPageWebAppletName`*]	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: ■ *SystemNameOfObject* is the specified record type. ■ *DetailPageWebAppletName* is the name of a detail page custom Web applet.
`Read ActionBarCustomWebApplet` *`ActionBarWebAppletName`*	This command exports the specified Action bar custom Web applet from Oracle CRM On Demand.
`Read HomeTabCustomWebApplet` *`HomeTabCustomWebAppletName`*	This command exports the specified Home tab custom Web applet from Oracle CRM On Demand.
`ReadAll` *`WebAppletType`*	This command exports all custom Web applets of *WebAppletType* from Oracle CRM On Demand, where *WebAppletType* is one of the following: ■ HomepageCustomWebApplet ■ DetailPageCustomWebApplet ■ ActionBarCustomWebApplet ■ HomeTabCustomWebApplet
`Upsert` *`WebAppletType MyWebAppletXML`*	This command updates or inserts a custom Web applet into Oracle CRM On Demand, where *WebAppletType* is one of the following: ■ HomepageCustomWebApplet ■ DetailPageCustomWebApplet ■ ActionBarCustomWebApplet ■ HomeTabCustomWebApplet

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 99
- "Action Bar Custom Web Applets" on page 102
- "Homepage Custom Web Applets" on page 104
- "Home Tab Custom Web Applets" on page 107

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
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:DisplayName>My Account Detail Page Applet </data:DisplayName>	<DisplayName> contains the name of the custom Web applet.
<data:Description></data:Description>	<Description> contains the description of the custom Web applet.
<data:DisplayNameCurrentUserLang>My Account Detail Page Applet </data:DisplayNameCurrentUserLang>	<DisplayNameCurrentUserLang> contains the name of the custom Web applet in the language of the currently-logged in user.
<data:Height>700</data:Height>	<Height> specifies the height of the custom Web applet, in pixels.

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

Element or Section	Description
<data:HTMLType> <data:HTMLHeader></data:HTMLHeader> <data:HTMLBody></data:HTMLBody> <data:AlwaysRun>false</data:AlwaysRun> </data:HTMLType>	If the custom Web applet is an HTML applet, then the details appear in the <HTMLType> section, as follows: ■ <HTMLHeader> contains the HTML code used in an <iframe> element within the HTML header of the page to which the custom Web applet is added. ■ <HTMLBody> contains the HTML code used in an <iframe> element within the HTML body of the page to which the custom Web applet is added. ■ <AlwaysRun> determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).
<data:FeedType> <data:URL></data:URL> <data:OverrideURLFlag>false</data:OverrideURLFlag> <data:TargetWindow>New Window</data:TargetWindow> </data:FeedType>	If the custom Web applet is an RSS feed applet, then the details appear in the <FeedType> section, as follows: ■ <URL> contains the URL that is invoked when the user clicks the hyperlink. ■ <OverrideURLFlag> determines whether the user can override the URL (true) or the user cannot override the URL (false). ■ <TargetWindow> specifies the window in which the custom Web applet opens. The valid values are as follows: ■ **Current Window.** The custom Web applet opens in the current window. ■ **New Window.** The custom Web applet opens in a new window.

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

Element or Section	Description
<data:URLType> <data:URL>http://www.oracle.com</data:URL> <data:AlwaysRun>false</data:AlwaysRun> </data:URLType>	If the custom Web applet is a URL applet, then the details appear in the <URLType> section, as follows: ■ <URL> contains the URL that is invoked when the user clicks the hyperlink. ■ <AlwaysRun> determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false). **NOTE:** Although it is possible to update or insert a custom Web applet of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.
<data:ModernIconName>mod_account_25.png </data:ModernIconName>	<ModernIconName> contains the file name of the modern theme icon for the custom Web applet. For more information about modern theme icons, see Appendix C, "Classic and Modern Theme Icons".
<data:ListOfTranslation> . . . </data:ListOfTranslation>	The <ListOfTranslation> section contains the translation values for the custom Web applet.
<data:ListOfTranslation> <data:Translation> <data:LanguageCode>ENU</data:LanguageCode> <data:DisplayName>My Account Detail Page Applet </data:DisplayName> </data:Translation> . . . </data:ListOfTranslation>	The <Translation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter code for the language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <DisplayName> contains the name for the applet in the language identified by the language code.

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
<data:DisplayName>My Action Bar Applet </data:DisplayName>	<DisplayName> contains the name of the custom Web applet.
<data:Description></data:Description>	<Description> contains the description of the custom Web applet.
<data:DisplayNameCurrentUserLang>My Action Bar Applet </data:DisplayNameCurrentUserLang>	<DisplayNameCurrentUserLang> contains the name of the custom Web applet in the language of the currently-logged in user.
<data:Height>200</data:Height>	<Height> specifies the height of the custom Web applet, in pixels.
<data:HTMLType> <data:HTMLHeader></data:HTMLHeader> <data:HTMLBody></data:HTMLBody> <data:AlwaysRun>false</data:AlwaysRun> </data:HTMLType>	If the custom Web applet is an HTML applet, then the details appear in the <HTMLType> section, as follows: ■ <HTMLHeader> contains the HTML code used in an <iframe> element within the HTML header of the page to which the custom Web applet is added. ■ <HTMLBody> contains the HTML code used in an <iframe> element within the HTML body of the page to which the custom Web applet is added. ■ <AlwaysRun> determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).

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

Element or Section	Description
<data:FeedType> <data:URL></data:URL> <data:OverrideURLFlag>false</data:OverrideURLFlag> <data:TargetWindow>New Window</data:TargetWindow> </data:FeedType>	If the custom Web applet is an RSS feed applet, then the details appear in the <FeedType> section, as follows: ■ <URL> contains the URL that is invoked when the user clicks the hyperlink. ■ <OverrideURLFlag> determines whether the user can override the URL (true) or the user cannot override the URL (false). ■ <TargetWindow> specifies the window in which the custom Web applet opens. The valid values are as follows: ■ **Current Window.** The custom Web applet opens in the current window. ■ **New Window.** The custom Web applet opens in a new window.
<data:URLType> <data:URL>http://www.oracle.com</data:URL> <data:AlwaysRun>false</data:AlwaysRun> </data:URLType>	If the custom Web applet is a URL applet, then the details appear in the <URLType> section, as follows: ■ <URL> contains the URL that is invoked when the user clicks the hyperlink. ■ <AlwaysRun> determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false). **NOTE:** Although it is possible to update or insert a custom Web applet of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.
<data:ListOfTranslation> . . . </data:ListOfTranslation>	The <ListOfTranslation> section contains the translation values for the custom Web applet.

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

Element or Section	Description
<data:ListOfTranslation> <data:Translation> <data:LanguageCode>ENU</data:LanguageCode> <data:DisplayName>My Action Bar Applet </data:DisplayName> </data:Translation> . . . </data:ListOfTranslation>	The <Translation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter code for the language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <DisplayName> contains the name for the applet in the language identified by the language code.

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
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:DisplayName>My Account Homepage Applet </data:DisplayName>	<DisplayName> contains the name of the custom Web applet.
<data:Description>This is my Account Homepage applet </data:Description>	<Description> contains the description of the custom Web applet.
<data:DisplayNameCurrentUserLang>My Account Homepage Applet</data:DisplayNameCurrentUserLang>	<DisplayNameCurrentUserLang> contains the name of the custom Web applet in the language of the currently-logged in user.
<data:Width>1</data:Width>	<Width> specifies the column width of the custom Web applet, as follows: ■ **1.** Specifies single-column width. ■ **2.** Specifies double-column width.
<data:Height>700</data:Height>	<Height> specifies the height of the custom Web applet, in pixels.

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

Element or Section	Description
<data:HTMLType> <data:HTMLHeader></data:HTMLHeader> <data:HTMLBody></data:HTMLBody> </data:HTMLType>	If the custom Web applet is an HTML applet, then the details appear in the <HTMLType> section, as follows: ■ <HTMLHeader> contains the HTML code used in an <iframe> element within the HTML header of the page to which the custom Web applet is added. ■ <HTMLBody> contains the HTML code used in an <iframe> element within the HTML body of the page to which the custom Web applet is added.
<data:FeedType> <data:URL></data:URL> <data:OverrideURLFlag>false</data:OverrideURLFlag> <data:TargetWindow>New Window</data:TargetWindow> </data:FeedType>	If the custom Web applet is an RSS feed applet, then the details appear in the <FeedType> section, as follows: ■ <URL> contains the URL that is invoked when the user clicks the hyperlink. ■ <OverrideURLFlag> determines whether the user can override the URL (true) or the user cannot override the URL (false). ■ <TargetWindow> specifies the window in which the custom Web applet opens. The valid values are as follows: ■ **Current Window.** The custom Web applet opens in the current window. ■ **New Window.** The custom Web applet opens in a new window.
<data:URLType> <data:URL>http://www.oracle.com</data:URL> </data:URLType>	If the custom Web applet is a URL applet, then the details appear in the <URLType> section. <URL> contains the URL that is invoked when the user clicks the hyperlink. **NOTE:** Although it is possible to update or insert a custom Web applet of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.

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

Element or Section	Description
<data:ReportType> <data:ReportPath></data:ReportPath> <data:ReportFlag>false</data:ReportFlag> </data:ReportType>	If the custom Web applet is a record-type homepage custom report, then the details appear in the <ReportType> section, as follows: ■ <ReportPath> is the path for a report in the V2 catalog, for example: Company Wide Shared Folder : Service : Service Analysis ■ <ReportFlag> specifies whether the report will run automatically (true) or if users will have to click a link to refresh the report (false). **NOTE:** You cannot extract, update, or insert record-type homepage custom reports that contain links to analyses or dashboards in the V3 catalog. In addition, although you can update or insert a record-type homepage custom report that contains a link to a report from the V2 catalog in an environment that is running Release 37 of Oracle CRM On Demand, the custom report configuration will be read-only in the user interface in that environment, and the report will not display on a homepage even if the custom report is added to a homepage layout.
<data:ListOfTranslation> . . . </data:ListOfTranslation>	The <ListOfTranslation> section contains the translation values for the custom Web applet.
<data:ListOfTranslation> <data:Translation> <data:LanguageCode>ENU</data:LanguageCode> <data:DisplayName>My Account Homepage Applet </data:DisplayName> </data:Translation> . . . </data:ListOfTranslation>	The <Translation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter code for the language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <DisplayName> contains the name for the applet in the language identified by the language code.

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
<data:DisplayName>MyHomepage Applet</data:DisplayName>	<DisplayName> contains the name of the custom Web applet.
<data:Description>This is my MyHomepage applet</data:Description>	<Description> contains the description of the custom Web applet.
<data:DisplayNameCurrentUserLang>MyHomepage Applet</data:DisplayNameCurrentUserLang>	<DisplayNameCurrentUserLang> contains the name of the custom Web applet in the language of the currently-logged in user.
<data:Width>1</data:Width>	<Width> specifies the column width of the custom Web applet, as follows: ■ **1.** Specifies single-column width. ■ **2.** Specifies double-column width.
<data:Height>700</data:Height>	<Height> specifies the height of the custom Web applet, in pixels.
<data:HTMLType> <data:HTMLHeader></data:HTMLHeader> <data:HTMLBody></data:HTMLBody> </data:HTMLType>	If the custom Web applet is an HTML applet, then the details appear in the <HTMLType> section, as follows: ■ <HTMLHeader> contains the HTML code used in an <iframe> element within the HTML header of the page to which the custom Web applet is added. ■ <HTMLBody> contains the HTML code used in an <iframe> element within the HTML body of the page to which the custom Web applet is added.

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

Element or Section	Description
<data:FeedType> <data:URL></data:URL> <data:OverrideURLFlag>false</data:OverrideURLFlag> <data:TargetWindow>New Window</data:TargetWindow> </data:FeedType>	If the custom Web applet is an RSS feed applet, then the details appear in the <FeedType> section, as follows: ■ <URL> contains the URL that is invoked when the user clicks the hyperlink. ■ <OverrideURLFlag> determines whether the user can override the URL (true) or the user cannot override the URL (false). ■ <TargetWindow> specifies the window in which the custom Web applet opens. The valid values are as follows: ■ **Current Window.** The custom Web applet opens in the current window. ■ **New Window.** The custom Web applet opens in a new window.
<data:URLType> <data:URL>http://www.oracle.com</data:URL> </data:URLType>	If the custom Web applet is a URL applet, then the details appear in the <URLType> section. <URL> contains the URL that is invoked when the user clicks the hyperlink. **NOTE:** Although it is possible to update or insert a custom Web applet of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.

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

Element or Section	Description
<data:ReportType> <data:ReportPath></data:ReportPath> <data:ReportFlag>false</data:ReportFlag> </data:ReportType>	If the custom Web applet is a My Homepage custom report, then the details appear in the <ReportType> section, as follows: ■ <ReportPath> is the path for a report in the V2 catalog, for example: Company Wide Shared Folder : Service : Service Analysis ■ <ReportFlag> specifies whether the report will run automatically (true) or if users will have to click a link to refresh the report (false). **NOTE:** You cannot extract, update, or insert My Homepage custom reports that contain links to analyses or dashboards in the V3 catalog. In addition, although you can update or insert a My Homepage custom report that contains a link to a report from the V2 catalog in an environment that is running Release 37 of Oracle CRM On Demand, the custom report configuration will be read-only in the user interface in that environment, and the report will not display on My Homepage even if the custom report is added to a My Homepage layout.
<data:ListOfTranslation> <data:Translation> <data:LanguageCode>ENU</data:LanguageCode> <data:DisplayName>MyHomepage Applet </data:DisplayName> </data:Translation> . . . </data:ListOfTranslation>	The <ListOfTranslation> section contains the translation values for the custom Web applet.
<data:ListOfTranslation> <data:Translation> <data:LanguageCode>ENU</data:LanguageCode> <data:DisplayName>MyHomepage Applet </data:DisplayName> </data:Translation> . . . </data:ListOfTranslation>	The <Translation> section contains the translation values for one language. ■ <LanguageCode> contains the three-letter code for the language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <DisplayName> contains the name for the applet in the language identified by the language code.

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 110
- "Extracting All Custom Web Applets" on page 112
- "Updating or Inserting a Custom Web Applet Definition (Upsert)" on page 113

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:

```
migrationtool -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 471.
- *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:

```
migrationtool -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, the Action bar, and the Home tab:

```
migrationtool -u UserID -s ServerURL ReadAll HomepageCustomWebApplet
migrationtool -u UserID -s ServerURL ReadAll DetailPageCustomWebApplet
migrationtool -u UserID -s ServerURL ReadAll ActionBarCustomWebApplet
migrationtool -u UserID -s ServerURL ReadAll HomeTabCustomWebApplet
```

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:

```
migration tool install/repository/WebAppletType/Object/WebApplet.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:

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

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 Object: Account 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 Object: Account Location: Detail Page	MY Custom Applet is inserted into the target company. The company now contains the following Account Web Applets: ■ My Custom Applet ■ MY Custom Applet
Name: My Custom Applet Object: Opportunity Location: Detail Page	My Custom Applet is inserted into the target company for the Opportunity object. The company now contains: ■ For the Account object: My Custom Applet ■ For the Opportunity object: My Custom Applet
Name: My Custom Applet Object: Global Location: Action Bar	My Custom Applet is inserted into the target company for the Global Web Applet section. The company now contains: ■ For the Account object: My Custom Applet ■ For the Global Web Applet section: My Custom Applet

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):

```
migrationtool -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:

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

- For Detail page custom Web applets:

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

- For Action bar custom Web applets:

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

- For Home tab custom Web applets:

  ```
  migrationtool -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 115
- Privileges Required for Migrating Sales Assessment Templates on page 116
- Elements and Sections in the Sales Assessment Template XML Output File on page 116
- Migrating Sales Assessment Templates on page 120

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 120.

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

Command	Description
`Read SalesAssessmentTemplate` *`AssessmentType`*	This command exports sales assessment template configuration data of the type specified by *AssessmentType*, 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` *`MySalesAssessmentScriptXML`*	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
`<data:Name>MyAssessment</data:Name>`	<Name> specifies the name of the sales assessment template.
`<data:Active>true</data:Active>`	<Active> specifies whether the sales assessment template is active (true) or inactive (false).

`<data:Filter1></data:Filter1>`
`<data:Filter2></data:Filter2>`
`<data:Filter3></data:Filter3>`
`<data:Filter4></data:Filter4>`
	The <Filter*n*> elements specify the filters that are used to identify which assessment script is the appropriate one to present to a user for a task.

`<data:AttributeValueNumber>` `</data:AttributeValueNumber>`	<AttributeValueNumber> shows the maximum number of answers specified for a question in the assessment script. This element is read-only and is ignored for upsert requests.
`<data:ChildScore></data:ChildScore>`	<ChildScore> shows the maximum score for the first question, which is calculated by multiplying the weight of the first question by the highest score specified for an answer for the first question. This element is read-only and is ignored for upsert requests.
`<data:Description>Sales Assessment</data:Description>`	<Description> contains the description of the sales assessment template.

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

Element or Section	Description
<data:FieldtoMapScoreTo></data:FieldtoMapScoreTo>	<FieldtoMapScoreTo> specifies the field that displays the score in the parent record.
<data:MaxAttrValue>4</data:MaxAttrValue>	<MaxAttrValue> shows the total number of answers for the questions in the assessment script. This element is read-only and is ignored for upsert requests.
<data:MaxPossibleScore></data:MaxPossibleScore>	<MaxPossibleScore> is a calculated value. For each question, the weight for the question is multiplied by the highest score for an answer for the question. The sum of the results for all questions is shown in this element. This element is read-only and is ignored for upsert requests.
<data:MaxScore></data:MaxScore>	This element is not used.
<data:ResponseControl>Drop-Down </data:ResponseControl>	<ResponseControl> specifies the control used for adding responses to assessment questions. Valid values are: Drop Down, and Radio Button.
<data:SalesMethod></data:SalesMethod>	This element is not used.
<data:SalesStages></data:SalesStages>	This element is not used.
<data:FieldtoMapOutcomeValueTo> </data:FieldtoMapOutcomeValueTo>	<FieldtoMapOutcomeValueTo> specifies the field that displays the outcome value in the parent record.
<data:RemoveCommentBox>false</data:RemoveCommentBox>	<RemoveCommentBox> determines whether the comment box is removed when the user is completing the assessment (true) or the comment box is visible (false).
<data:OutcomeValueIfThresholdMet> </data:OutcomeValueIfThresholdMet>	<OutcomeValueIfThresholdMet> specifies the outcome value to display if the threshold score is met.
<data:OutcomeValueIfThresholdNotMet> </data:OutcomeValueIfThresholdNotMet>	<OutcomeValueIfThresholdNotMet> specifies the outcome value to display if the threshold score is not met.
<data:ThresholdScore>40</data:ThresholdScore>	<ThresholdScore> specifies the threshold that is used to calculate the outcome of the script. If the score is equal to or higher than the threshold, then the outcome is met.

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

Element or Section	Description
`<data:Type>Account Survey</data:Type>`	<Type> specifies the type of the assessment script. The valid values are: ■ Account Survey ■ Activity Assessment ■ BusinessPlan Assessment ■ Contact Script ■ Lead Qualification ■ Objective Assessment ■ Opportunity Assessment ■ Service Request - Script ■ Service Request - Survey
`<data:TemplateType>Assessment</data:TemplateType>`	<TemplateType> specifies the record type of the assessment script. This element is always set to Assessment, is read-only, and is ignored for upsert requests.

`<data:ListOfSalesAssessmentTemplateAttribute>`
`. . .`
`</data:ListOfSalesAssessmentTemplateAttribute>`
	The <ListOfSalesAssessmentTemplateAttribute> section contains the details of the criteria specified for the sales assessment template.

`<data:ListOfSalesAssessmentTemplateAttribute>`
`  <data:SalesAssessmentTemplateAttribute>`
`. . .`
`  </data:SalesAssessmentTemplateAttribute>`
`. . .`
`</data:ListOfSalesAssessmentTemplateAttribute>`
	The <SalesAssessmentTemplateAttribute> section contains the details of one criterion for the assessment.

`<data:ListOfSalesAssessmentTemplateAttribute>`
`  <data:SalesAssessmentTemplateAttribute>`
`  <data:Question></data:Question>`
`. . .`
`  </data:SalesAssessmentTemplateAttribute>`
`. . .`
`</data:ListOfSalesAssessmentTemplateAttribute>`
	<Question> specifies a question to be answered by the user.

`<data:ListOfSalesAssessmentTemplateAttribute>`
`  <data:SalesAssessmentTemplateAttribute>`
`. . .`
`  <data:CriteriaName></data:CriteriaName>`
`. . .`
`  </data:SalesAssessmentTemplateAttribute>`
`. . .`
`</data:ListOfSalesAssessmentTemplateAttribute>`
	<CriteriaName> contains a descriptive name for the question.

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

Element or Section	Description
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:ChildNumber>2</data:ChildNumber> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<ChildNumber> shows the number of answers that are specified for the question. This element is read-only and is ignored for upsert requests.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:ChildOrder>1</data:ChildOrder> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<ChildOrder> shows the sequence number of the first answer to the first question. This element is read-only and is ignored for upsert requests.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:ChildScore>100</data:ChildScore> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<ChildScore> shows the score assigned to the first answer for the question. This element is read-only and is ignored for upsert requests.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:AnswerMapToField></data:AnswerMapToField> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<AnswerMapToField> specifies the field on the parent record for displaying the answer to the question.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:MaxChild>100</data:MaxChild> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<MaxChild> shows the highest score assigned to an answer for the question. This element is read-only and is ignored for upsert requests.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:Order>1</data:Order> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<Order> specifies the position of this question in the sequence of questions presented to the user.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:ParentType>Account Survey</data:ParentType> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<ParentType> shows the type of the sales assessment to which the question belongs. This element is read-only and is ignored for upsert requests.

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

Element or Section	Description
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:Weight>50</data:Weight> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<Weight> specifies a percentage value that indicates the importance of the question. The sum of the weights for all questions must equal 100.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:WeightxScore>5000</data:WeightxScore> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	<WeightxScore> is the maximum score for the question. It is calculated by multiplying the weight of the question by the highest score assigned to an answer for the question. This element is read-only and is ignored for upsert requests.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:ListOfSalesAssessmentAttributeValue> . . . </data:ListOfSalesAssessmentAttributeValue> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	The <ListOfSalesAssessmentAttributeValue> section contains the elements for the *Answer* section of the Assessment Script template.
<data:ListOfSalesAssessmentTemplateAttribute> <data:SalesAssessmentTemplateAttribute> . . . <data:ListOfSalesAssessmentAttributeValue> <data:SalesAssessmentAttributeValue> <data:Description></data:Description> <data:Order>1</data:Order> <data:Answer></data:Answer> <data:Score>100</data:Score> </data:SalesAssessmentAttributeValue> . . . </data:ListOfSalesAssessmentAttributeValue> . . . </data:SalesAssessmentTemplateAttribute> . . . </data:ListOfSalesAssessmentTemplateAttribute>	The <SalesAssessmentAttributeValue> section contains the details of one answer, in the following elements: ■ <Order> indicates the position of this answer in the sequence of the answers presented to the user when completing the assessment. ■ <Answer> contains the answer for the question. ■ <Score> contains the score for the answer. **NOTE:** The Description element in this section is not used.

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 121

■ "Extracting All Sales Assessment Templates" on page 122

■ "Updating or Inserting a Specific Sales Assessment Template (Upsert)" on page 123

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:

```
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.

```
migrationtool -u UserID -s ServerURL Read SalesAssessmentTemplate ActivityAssessment
```

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:

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

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\MySalesAssessmentScipt.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 125
- Privileges Required for Migrating Homepage Layouts on page 125
- Elements and Sections in the Homepage Layout XML Output File on page 126
- Migrating Homepage Layouts on page 130

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 130.

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` *`HomepageLayoutXML`*	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
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:LayoutName>Account Default Layout </data:LayoutName>	<LayoutName> contains the name of the homepage layout.
<data:Description>My Account Homepage Layout </data:Description>	<Description> contains a description of the homepage layout.
<data:ListOfAvailableSection> . . . </data:ListOfAvailableSection>	The <ListOfAvailableSection> section contains the details of the sections that are included in the Available Sections list in the homepage layout.

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

Element or Section	Description
<data:ListOfAvailableSection> <data:AvailableSection> <data:SectionName>AccountRecentlyApplet </data:SectionName> <data:SectionLayoutName>MyRecentlyModifiedAccounts </data:SectionLayoutName> </data:AvailableSection> . . . </data:ListOfAvailableSection>	The <AvailableSection> section contains the details of one section that is in the Available Sections list in the homepage layout: ■ <SectionName> contains an internal applet name that is associated with the SectionLayoutName. Do not modify this element. ■ <SectionLayoutName> contains the section layout name. **NOTE:** The section layout name is the name of a homepage section in the layout. This name is not the same as the display name of the section as it appears in the Homepage Layout wizard. For reference information about the mapping of section layout names to the corresponding UI names, see "Homepage Section Layout Mapping" on page 485.
<data:ListOfSelectedSection> . . . </data:ListOfSelectedSection>	The <ListOfSelectedSection> section contains the details of the sections that are included in the Left Side and Right Side lists in the homepage layout.

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

Element or Section	Description
<data:ListOfSelectedSection> <data:SelectedSection> <data:SectionName>PdqList</data:SectionName> <data:SectionLayoutName>HomepageAccountList </data:SectionLayoutName> <data:Sequence>0</data:Sequence> </data:SelectedSection> . . . </data:ListOfSelectedSection>	The <SelectedSection> section contains details of one section that is in either the Left Side list or the Right Side list in the homepage layout: ■ <SectionName> contains an internal applet name that is associated with the SectionLayoutName. Do not modify this element. ■ <SectionLayoutName> contains the section layout name. **NOTE:** The section layout name is the name of a homepage section in the layout. This name is not the same as the display name of the section as it appears in the Homepage Layout wizard. For reference information about the mapping of section layout names to the corresponding UI names, see "Homepage Section Layout Mapping" on page 485. ■ <Sequence> determines the column in which the section is displayed: ■ An even number, including 0 (zero), indicates that the section is in the Left Side list, where 0 (zero) is the first section. ■ An odd number indicates that the section is in the Right Side list, where a value of 1 is the top (or first) section.

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 485.

About the PdqList Section Name

In the <ListOfSelectedSection> section in "Elements and Sections in the Homepage Layout XML File" on page 126, 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 layout 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>All Recently Modified Accounts</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>AccountRecentlyApplet</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 130
- "Updating or Inserting a Homepage Layout (Upsert)" on page 131

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:

```
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.

About the Upsert Operation

The `Upsert` command inserts or updates a homepage layout based on the <LayoutName> value. If a homepage layout already exists with the same <LayoutName> value, then the homepage layout is updated, otherwise, a new homepage layout is created. The matching of the homepage layout names is case sensitive.

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

NOTE: The homepage layout cannot reference 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):

```
migrationtool -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:

```
migrationtool -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 135
- Privileges Required for Migrating Action Bar Layouts on page 135
- Elements and Sections in the Action Bar Layout XML Output File on page 136
- Migrating Action Bar Layouts on page 138

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 138.

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

Command	Description
`ReadAll ActionBarLayout`	This command exports all Action bar layouts for all objects.
`Upsert ActionBarLayout` *`ActionBarLayoutXML`*	This command updates or inserts an Action bar layout, as required.

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
<data:LayoutName>My Custom Action Bar Layout </data:LayoutName>	The <LayoutName> element contains the name of the Action bar layout.
<data:Description>Custom Action Bar Layout Description</data:Description>	The <Description> element contains the description of the Action bar layout.
<data:ListOfSections> . . . </data:ListOfSections>	The <ListOfSections> section contains the details of the Action bar sections.

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

Element or Section	Description
<data:ListOfSections> <data:Section> <data:Name>Global Search Multi Field</data:Name> <data:Displayed>true</data:Displayed> <data:Sequence>-2</data:Sequence> <data:GlobalHeaderSection>false <data:GlobalHeaderSection> </data:Section> <data:Section> <data:Name>Quick Message Center</data:Name> <data:Displayed>true</data:Displayed> <data:Sequence>-2</data:Sequence> <data:GlobalHeaderSection>false </data:GlobalHeaderSection> </data:Section> <data:Section> <data:Name>Calendar Action Applet</data:Name> <data:Displayed>false</data:Displayed> <data:Sequence>-1</data:Sequence> <data:GlobalHeaderSection>false </data:GlobalHeaderSection> </data:Section> <data:Section> <data:Name>Quick Favorite Lists</data:Name> <data:Displayed>true</data:Displayed> <data:Sequence>3</data:Sequence> <data:GlobalHeaderSection>false </data:GlobalHeaderSection> </data:Section> <data:Section> <data:Name>Quick History</data:Name> <data:Displayed>true</data:Displayed> <data:Sequence>1</data:Sequence> <data:GlobalHeaderSection>true </data:GlobalHeaderSection> </data:Section> <data:Section> <data:Name>Quick Favorite Records</data:Name> <data:Displayed>true</data:Displayed> <data:Sequence>2</data:Sequence> <data:GlobalHeaderSection>true </data:GlobalHeaderSection> </data:Section> <data:Section> <data:Name>Quick Create</data:Name> <data:Displayed>true</data:Displayed> <data:Sequence>0</data:Sequence> <data:GlobalHeaderSection>false </data:GlobalHeaderSection> </data:Section> </data:ListOfSections>	The <Section> section contains the details of one section in the Action bar, as follows: ■ <Name> contains the name of the section. ■ The <Displayed> element is not used. A value might be returned by a read operation, but the element is ignored for upsert operations. ■ <Sequence> indicates the position of the section in the lists of sections for the Action bar layout, as follows: ■ Positive integers (for example, 0, 1, 2, 3, and so on) indicate that the section is in the Action Bar Displayed Sections list, and the value indicates the location of the section, with 0 (zero) meaning the section is located at the top of the Action bar. ■ A value of -1 indicates that the section is in the Action Bar Available Sections list. ■ A value of -2 indicates that the section is in the Not Available Sections list. ■ A value of -3 indicates that the section is in the Global Header Available Sections list. ■ <GlobalHeaderSection> specifies whether the section is included in the Global Header Available Sections list (true) or is not included in the Global Header Available list (false).
<data:ListOfGlobalHeaders> . . . </data:ListOfGlobalHeaders>	The <ListOfGlobalHeaders> section contains the specification for the global header for the Action bar layout.

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

Element or Section	Description
<data:ListOfGlobalHeaders> <data:GlobalHeader> <data:Order>1</data:Order> <data:Icon>202</data:Icon> <data:Applet>Global Header Create</data:Applet> <data:AppletWidth>0</data:AppletWidth> <data:AppletDescription/> </data:GlobalHeader> <data:GlobalHeader> <data:Order>3</data:Order> <data:Icon>205</data:Icon> <data:Applet>Quick Favorite Records </data:Applet> <data:AppletWidth>160</data:AppletWidth> <data:AppletDescription/> </data:GlobalHeader> <data:GlobalHeader> <data:Order>2</data:Order> <data:Icon>202</data:Icon> <data:Applet>Quick History</data:Applet> <data:AppletWidth>160</data:AppletWidth> <data:AppletDescription/> </data:GlobalHeader> </data:ListOfGlobalHeaders>	The <GlobalHeader> section contains details of one section in the global header, as follows: ■ <Order> indicates the order in which the section is displayed in the global header (required). ■ <Icon> contains the name of the icon for the section (required). ■ <Applet> contains the name of the section (required). ■ <AppletWidth> specifies the width of the section (required). ■ <AppletDescription> contains a description of the section.

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 139

■ "Updating or Inserting an Action Bar Layout (Upsert)" on page 139

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:

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

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:

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

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.

About the Upsert Operation

The Upsert command inserts or updates an Action bar layout based on the <LayoutName> value. If an Action bar layout already exists with the same <LayoutName> value, then an update occurs, otherwise, a new Action bar layout is created.

The matching of the Action bar layout names is case sensitive. For example, <LayoutName>My Custom Action Bar Layout</LayoutName> and <LayoutName>MY Custom Action Bar Layout</LayoutName> are considered two different layouts (because the first layout name contains My, while the second layout name contains MY).

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):

```
migrationtool -u UserID -s ServerURL Upsert ActionBarLayout ActionBarLayoutXML
```

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.
- *ActionBarLayoutXML* is the fully qualified path name of the Action bar layout XML file, for example:

  ```
  C:\My Files\MyActionBarLayout.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:

```
migrationtool -u UserID -s ServerURL Upsert ActionBarLayout "C:\My
Files\MyActionBarLayout.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 141
- Privileges Required for Migrating Related Information Layouts on page 142
- Elements and Sections in the Related Information Layout XML Output File on page 142
- Migrating Related Information Layouts on page 144

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 144.

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

Command	Description
`Read RelatedInformationLayout` *`SystemNameOfObject`*	This command exports a set of related information layouts from Oracle CRM On Demand. *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll RelatedInformationLayout`	This command exports all related information layouts in the Oracle CRM On Demand tenant.
`Upsert RelatedInformationLayout` *`MyRelatedInfoLayoutXML`*	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
<data:IncludeAll>false </data:IncludeAll>	<IncludeAll> specifies whether the preconfigured related information layouts are returned in addition to the customized layouts (true), or if only the customized layouts are returned. The default setting is false.
<data:CurrentUserOnly>false </data:CurrentUserOnly>	<CurrentUserOnly> 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.
<data:ObjectName>Account </data:ObjectName>	<ObjectName> contains the system name of the parent record type (object), which never changes.
<data:RelatedInformationName> OptyChildList </data:RelatedInformationName>	<RelatedInformationName> contains the child applet ID of the related information section. For information about child applet IDs and their mappings to the names of the related information sections as they appear in the UI, see "Child Applet IDs and Their Corresponding Names" on page 519.
<data:Name>Opportunities </data:Name>	<Name> contains the name given to the related information layout.
<data:Description>Test Related Opportunities </data:Description>	<Description> contains the description of the layout.

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

Element or Section	Description
<data:RelatedInformationLayout> . . . <data:SortField>Name </data:SortField> <data:SortDir>Ascending </data:SortDir> . . . <data:RelatedInformationLayout>	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: ■ <SortField> 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. ■ <SortDir> corresponds to the Sort Order field in the Page Layout wizard. It specifies the sort order for the records in the related information section. The <SortField> and <SortDir> elements are applicable for the Opportunities related record type only, and only for the following parent record types: ■ Account ■ Campaign ■ Contact ■ Custom Object 01 ■ Custom Object 02 ■ Custom Object 03 ■ Dealer ■ Objective ■ Opportunity (the Sub-Opportunities related record type) ■ Partner Program The valid values for the <SortField> element are: ■ Primary Revenue Close Date. Corresponds to the Close Date field. ■ Created. Corresponds to the Created: Date field. ■ Name. Corresponds to the Opportunity Name field. ■ Updated. Corresponds to the Modified: Date field. The valid values for the <SortDir> element are Ascending and Descending.
<data:ListOfSelectedField> . . . </data:ListOfSelectedField>	The <ListOfSelectedField> section contains a <SelectedField> child section for each field that appears in the Selected Fields list in the related information layout.

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

Element or Section	Description
<data:ListOfSelectedField> <data:SelectedField> <data:FieldName>Contact Full Name </data:FieldName> <data:Sequence>0 </data:Sequence> </data:SelectedField> . . . </data:ListOfSelectedField>	The <SelectedField> section contains the details of one field in the Selected Fields list in the related information layout: ■ <FieldName> contains the name of the field. ■ <Sequence> specifies the sequence of the field in the Selected Fields list. The valid values are the integers 0 through 19.

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 144

■ "Extracting All Related Information Layouts for All Objects" on page 145

■ "Updating or Inserting a Specific Related Information Layout (Upsert)" on page 146

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 471.

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:

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

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

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:

migration tool install/repository/RelatedInformationLayout/*Object*/*RelatedInformationObject*/*LayoutName*.xml

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

```
.../repository/RelatedInformationLayout/Account/AccountCompetitorChildList/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:

```
migrationtool -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 Related Object: Account Competitors Layout Name: My Custom Layout	Object: Account Related Object: Account Competitors Layout: Standard Related Information Layout	A new My Custom Layout is inserted
Object: Account Related Object: Account Competitors Layout Name: My Custom Layout	Object: Account Related Object: Account Competitors Layouts: ■ Standard Related Information Layout ■ 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 Related Object: Account Competitors Layout Name: Standard Related Information Layout	Object: Account Related Object: Account Competitors Layouts: ■ Standard Related Information Layout ■ 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 that exceeds the length supported in the UI.
- The XML contains a description that exceeds the length supported in the UI.
- The XML content references fields that do not exist in the target environment.

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):

```
migrationtool -u UserID -s ServerURL Upsert RelatedInformationLayout
MyRelatedInfoLayoutXML
```

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 Files\MyRelatedInfoLayout.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:\My
Files\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 149
- Privileges Required for Migrating Access Profiles on page 150
- Elements and Sections in the Access Profile XML Output File on page 150
- Migrating Access Profiles on page 152

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 152.

Table 40. Oracle Migration Tool On Demand Commands for Access Profiles

Command	Description
`Read AccessProfile [`*`SystemNameOfAccessProfile`*`]`	This command exports a single access profile from an Oracle CRM On Demand server.
`ReadAll AccessProfile [`*`FolderLocation`*`]`	This command exports all access profiles from an Oracle CRM On Demand server.
`Upsert AccessProfile` *`AccessProfileXML`*	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>Administrator</data:Name>`	<Name> contains the system name of the access profile. This is the same name that is used to retrieve a single access profile. 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>`	<NameTranslation> contains the name of the access profile in the language of the user who extracts the access profile information. This element is read-only and is ignored for Upsert requests.
`<data:AccessProfileId></data:AccessProfileId>`	<AccessProfileID> contains the access profile ID. This element is read-only and is ignored for Upsert requests.
`<data:Description></data:Description>`	<Description> 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:AvailableForTeam>false</data:AvailableForTeam>	<AvailableForTeam> specifies whether the access profile can be granted to team members (true) or cannot be granted to team members (false). This element corresponds to the Grantable to Team Members check box in Step 1 of the Access Profile Wizard.
<data:AvailableForBook>false</data:AvailableForBook>	<AvailableForBook> specifies whether the access profile can be assigned to a user's association with a book (true) or cannot be assigned to a user's association with a book (false). This element corresponds to the Grantable to Book Users check box in Step 1 of the Access Profile Wizard.
<data:Disabled>false</data:Disabled>	<Disabled> indicates if the access profile is disabled (true) or is not disabled (false). This element corresponds to the Disabled check box in Step 1 of the Access Profile Wizard.
<data:ListOfAccessProfileTranslation> . . . </data:ListOfAccessProfileTranslation>	The <ListOfAccessProfileTranslation> section contains the translation values for the access profile.
<data:ListOfAccessProfileTranslation> <data:AccessProfileTranslation> <data:LanguageCode>DEU</data:LanguageCode> <data:Title>Administrator Standardzugriffsprofil </data:Title> <data:Description>Vom System erzeugt </data:Description> </data:AccessProfileTranslation> . . . </data:ListOfAccessProfileTranslation>	The <AccessProfileTranslation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter code for a language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <Title> contains the title for the access profile in the language identified by the language code. ■ <Description> contains the description for the access profile in the language identified by the language code. In this example, when the user's language is set to German (DEU), the following values are displayed in the access profile: ■ The title of the access profile is *Administrator Standardzugriffsprofil* ■ The description is *Vom System erzeugt*

Table 41. Elements and Sections in the Access Profile XML File

Element or Section	Description
<data:ListOfAccessProfileEntry> . . . </data:ListOfAccessProfileEntry>	The <ListOfAccessProfileEntry> section describes the access rights defined on the access profile.
<data:ListOfAccessProfileEntry> <data:AccessProfileEntry> <data:AccessObjectName>CustomObject10 </data:AccessObjectName> <data:PermissionCode>R</data:PermissionCode> </data:AccessProfileEntry> . . . </data:ListOfAccessProfileEntry>	The <AccessProfileEntry> section describes one access object (that is, a record type or related record type for which a permission can be granted) and the permissions granted for the access object: ■ <AccessObjectName> is the name of the access object. For information about the access object names that appear in the <AccessObjectName> elements in the XML, and their associated display names in the user interface, see "Access Objects and Corresponding Display Names" on page 341. ■ <PermissionCode> is the code corresponding to the permission for an access object, for example, R, RU, CRUD and so on. For information about the permissions that are available for the access objects, see "Access Levels and Corresponding Permission Codes in the XML File" on page 445.

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 153
- "Extracting a Single Access Profile by System Name Using a Template File" on page 153
- "Extracting All Access Profiles" on page 155
- "Extracting All Access Profiles to a Specific Location" on page 155
- "Updating or Inserting an Access Profile (Upsert)" on page 156

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:

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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>)`

```
migrationtool -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):

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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.

About the Upsert Operation

The `Upsert` command inserts or updates an access profile based on the <Name> value, which is the system name of the access profile. If an access profile already exists with the same <Name> value, then the access profile is updated, otherwise, a new access profile is created. The matching of the access profile system names is case sensitive.

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):

```
migrationtool -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 159
- Privileges Required for Migrating Page Layouts on page 160
- Elements and Sections in the Page Layout Field Information XML Output File on page 161
- Elements and Sections in the Page Layout Related Information XML Output File on page 163
- Elements and Sections in the Page Layout Section XML Output File on page 165
- Migrating Page Layout Field Information on page 167
- Migrating Page Layout Related Information on page 169
- Migrating Page Layout Section Information on page 171

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 173.

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 167.

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` *`PageLayoutFieldXML`*	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` *`PageLayoutRelatedXML`*	This command updates or inserts page layout related information. The page layout is derived from an XML file definition.
`Upsert PageLayoutSection` *`PageLayoutSectionXML`*	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
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:LayoutName>My Custom Account Page Layout </data:LayoutName>	<LayoutName> contains the name of the page layout.
<data:Description>My Custom Account Page Layout Description</data:Description>	<Description> contains the description of the page layout.
<data:ListOfPageLayoutField> <data:PageLayoutField> <data:FieldName>Name</data:FieldName> <data:ReadOnly>false</data:ReadOnly> <data:Required>true</data:Required> <data:Section>0</data:Section> <data:Column>0</data:Column> <data:Row>0</data:Row> </data:PageLayoutField> . . . </data:ListOfPageLayoutField>	The <ListOfPageLayoutField> section contains the field layout information. For more information, see "Example of the Values for Page Layout Field Information" on page 162.

Example of the Values for Page Layout Field Information

Figure 2 illustrates how the section, column, and row values that the XML output generates map to the field layout for a page layout.

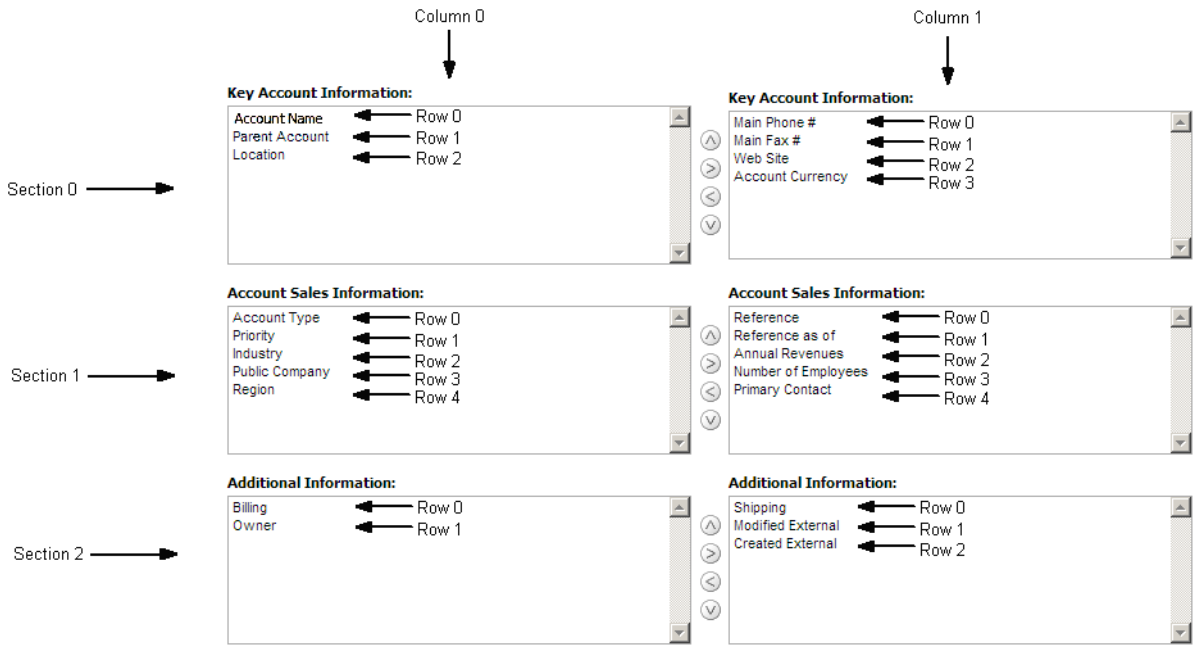

Figure 2. Example of the Values for the Page Layout Field Information

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
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:LayoutName>My Custom Account Page Layout</data:LayoutName>	<LayoutName> contains the name of the page layout.
<data:ListOfPageRelatedInformation> . . . </data:ListOfPageRelatedInformation>	The <ListOfPageRelatedInformation> section contains the details of the related information sections for the page layout.
<data:ListOfPageRelatedInformation> <data:PageRelatedInformation> . . . </data:PageRelatedInformation> . . . </data:ListOfPageRelatedInformation>	The <PageRelatedInformation> section contains the details of one related information section for the page layout.
<data:ListOfPageRelatedInformation> <data:PageRelatedInformation> <data:Name>CRMODLS_BPL_ACNT.ChildList</data:Name> . . . </data:PageRelatedInformation> . . . </data:ListOfPageRelatedInformation>	<Name> contains the child applet ID of the related information section. For information about child applet IDs and their mappings to the names of the related information sections as they appear in the UI, see "Child Applet IDs and Their Corresponding Names" on page 519.
<data:ListOfPageRelatedInformation> <data:PageRelatedInformation> . . . <data:Availability>-1</data:Availability> . . . </data:PageRelatedInformation> . . . </data:ListOfPageRelatedInformation>	<Avalability> indicates the position of the related information section in the lists of related information sections for the page layout. For more information, see "Example of the Values for Page Layout Related Information" on page 164.
<data:ListOfPageRelatedInformation> <data:PageRelatedInformation> . . . <data:RelatedInformationLayout> </data:RelatedInformationLayout> </data:PageRelatedInformation> . . . </data:ListOfPageRelatedInformation>	<RelatedInformationLayout> contains the name given to the related information layout.

Example of the Values for Page Layout Related Information

Figure 3 illustrates how the values in the <Availability> element map to the lists of related information sections for a page layout. The availability values are as follows:

- A value of -1 indicates that the related information section is in the Not Available Information list.
- A value of 0 indicates that the related information section is in the Available Information list.
- A value of 1 indicates that the related information section is in the Displayed Information list.

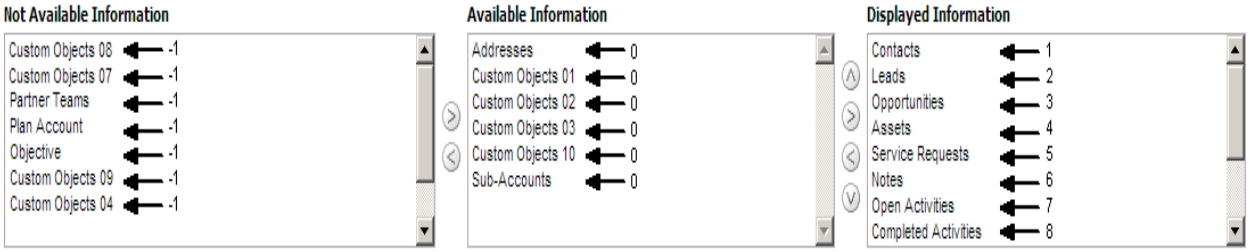

Figure 3. Example of the Values for Page Layout Related Information

About the Displayed Information List

The order of the sections in the XML file for the Displayed Information list (that is, the sections for which the <Availability> value is set to 1) determines the order in which the related information sections are displayed in the UI. This order applies to both the `ReadAll` and `Upsert` commands. Figure 4 on page 165 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.

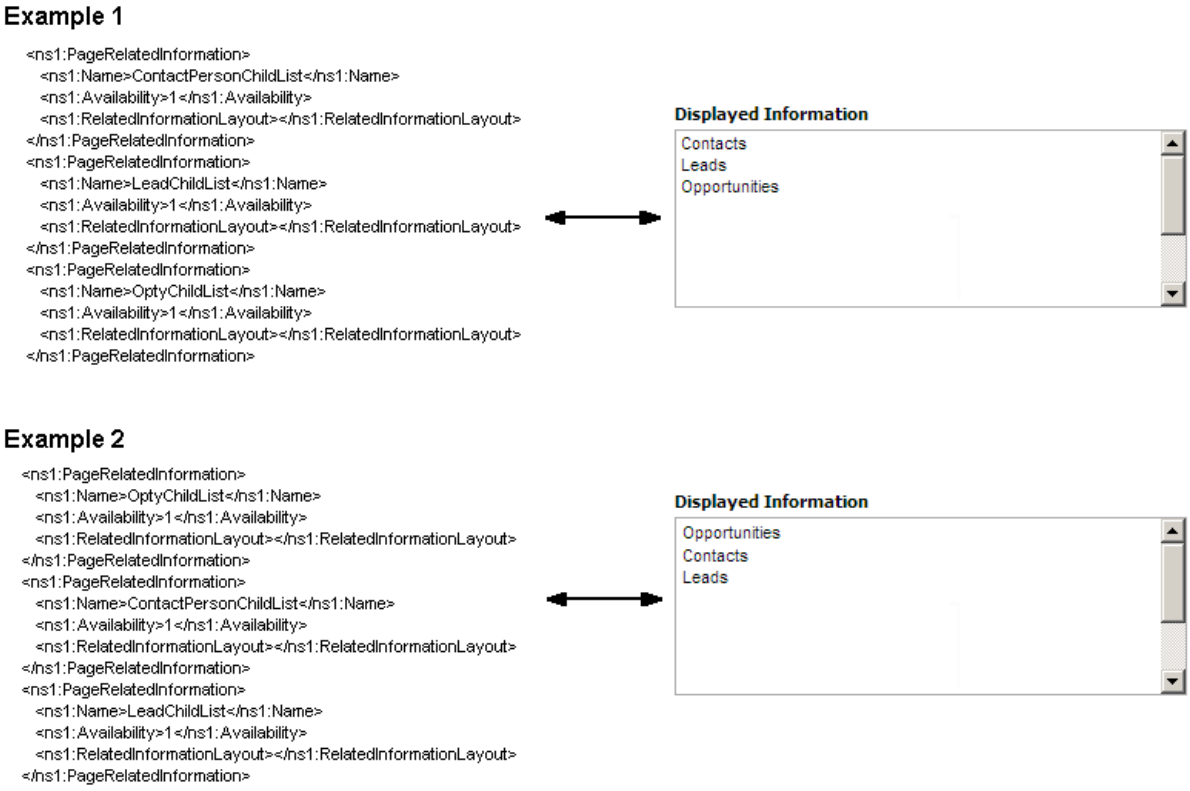

Figure 4. About the Displayed Information Section

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>`	<ObjectName> contains the system name of the record type (object), which never changes.
`<data:LayoutName>myPageAccountLayout</data:LayoutName>`	<LayoutName> contains the name of the page layout.

Table 45. Elements and Sections in the Page Layout Section XML File

Element or Section	Description
<data:ListOfPageFormSection> <data:PageFormSection> <data:SectionSequence>3</data:SectionSequence> . . . </data:PageFormSection> . . . </data:ListOfPageFormSection>	The <ListOfPageFormSection> section contains the details of the sections for the page layout.
<data:ListOfPageFormSection> <data:PageFormSection> . . . </data:PageFormSection> . . . </data:ListOfPageFormSection>	The <PageFormSection> section contains the details of one section in the page layout.
<data:ListOfPageFormSection> <data:PageFormSection> <data:SectionSequence>3</data:SectionSequence> . . . </data:PageFormSection> . . . </data:ListOfPageFormSection>	For information about the <SectionSequence> element, see "Example of the Values for Page Layout Sections" on page 166.
<data:ListOfPageFormSection> <data:PageFormSection> . . . <data:ListOfFormSectionTranslation> . . . </data:ListOfFormSectionTranslation> </data:PageFormSection> . . . </data:ListOfPageFormSection>	The <ListOfFormSectionTranslation> section contains the translation values for the section name.
<data:ListOfPageFormSection> <data:PageFormSection> . . . <data:ListOfFormSectionTranslation> <data:FormSectionTranslation> <data:LangId>ENU</data:LangId> <data:DisplayName>myPageAccountLayout </data:DisplayName> </data:FormSectionTranslation> . . . </data:ListOfFormSectionTranslation> . . . </data:PageFormSection> . . . </data:ListOfPageFormSection>	The <FormSectionTranslation> section contains the translation values for one language: ■ <LangId> contains the three-letter code for a language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <DisplayName> contains the name for the section in the language identified by the language code.

Example of the Values for Page Layout Sections

In a page layout section XML file, the <SectionSequence> element specifies the location of a section relative to the other sections in the layout. 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 a page layout section XML file, which shows the values for the *Additional Information:* section:

```
<data:SectionSequence>2</data:SectionSequence>
<data:ListOfFormSectionTranslation>
<data:FormSectionTranslation>
<data:LangId>ENU</data:LangId>
<data:DisplayName>Additional Information:</data:DisplayName>
</data:FormSectionTranslation>
</data:ListOfFormSectionTranslation>
```

The <SectionSequence> element in the XML output is set to 2 for the *Additional Information:* section, which corresponds to the position of the *Additional Information:* section in the list of sections shown in Figure 5. The *Additional Information:* section is the third section in the list.

Figure 5. Example Page Layout Section Setup

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 168
- "Updating or Inserting Page Layout Field Information for a Single Object (Upsert)" on page 168

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:

```
migrationtool -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:

```
migrationtool -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 169
- "Updating or Inserting Page Layout Related Information for a Single Object (Upsert)" on page 170

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:

```
migrationtool -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:

```
migrationtool -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):

```
migrationtool -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 171
- "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:

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

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):

```
migrationtool -u UserID -s ServerURL Upsert PageLayoutSection PageLayoutSectionXML
```

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 Files\PageLayoutSection\Account\AccountPageLayoutSection.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:\My
Files\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 173
- Privileges Required for Migrating Dynamic Page Layouts on page 173
- Elements and Sections in the Dynamic Page Layout XML Output File on page 174
- Migrating Dynamic Page Layouts on page 175

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 175.

Table 46. Commands Used with Dynamic Page Layouts in Oracle Migration Tool On Demand

Command	Description
`Read DynamicLayout` *`SystemNameOfObject`*	This command extracts the configuration data for the dynamic page layouts for a specific record type (object). *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll DynamicLayout`	This command extracts the configuration data for the dynamic page layouts for all objects.
`Upsert DynamicLayout` *`DynamicLayoutXML`*	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
<data:ObjectName>Opportunity</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:DrivingPicklist>Sales Type</data:DrivingPicklist>	<DrivingPicklist> contains the name of the dynamic page layout driving picklist. For more information about driving picklists, see *Oracle CRM On Demand Online Help*.
<data:ListOfDynamicLayouts> . . . </data:ListOfDynamicLayouts>	The <ListOfDynamicLayouts> section contains the details of the dynamic page layouts for the object.
<data:ListOfDynamicLayouts> <data:DynamicLayout> . . . </data:DynamicLayout> . . . </data:ListOfDynamicLayouts>	The <DynamicLayout> section contains the details of one dynamic page layout.
<data:ListOfDynamicLayouts> <data:DynamicLayout> <data:Name>dynamic</data:Name> . . . </data:ListOfDynamicLayouts>	<Name> contains the name of the dynamic page layout.
<data:ListOfDynamicLayouts> <data:DynamicLayout> . . . <data:DefaultLayout>Opportunity Page Standard Layout</data:DefaultLayout> . . . </data:DynamicLayout> . . . </data:ListOfDynamicLayouts>	<DefaultLayout> contains the name of the default page layout with which the driving picklist values are associated.

Table 47. Elements and Sections in the Dynamic Page Layout XML File

Element or Section	Description
<data:ListOfDynamicLayouts> <data:DynamicLayout> . . . <data:ModifiedBy>sales10 </data:ModifiedBy> . . . </data:DynamicLayout> . . . </data:ListOfDynamicLayouts>	<ModifiedBy> contains the name of the user who last updated the dynamic page layout.
<data:ListOfDynamicLayouts> <data:DynamicLayout> . . . <data:Description>Dynamic Layout Description </data:Description> . . . </data:DynamicLayout> . . . </data:ListOfDynamicLayouts>	<Description> contains the description of the dynamic page layout.
<data:ListOfDynamicLayouts> <data:DynamicLayout> . . . <data:ListOfPicklistValueMapping> <data:DrivingPicklist> <data:Value>New Business </data:Value> <data:AssignedLayout>test2 </data:AssignedLayout> </data:DrivingPicklist> </data:ListOfPicklistValueMapping> . . . </data:DynamicLayout> . . . </data:ListOfDynamicLayouts>	The <ListofPicklistValueMapping> section contains the mappings of the driving picklist values to the page layouts: ■ <Value> contains the driving picklist value. ■ <AssignedLayout> contains the name of the page layout that is displayed when the driving picklist value is selected.

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 176
- "Updating or Inserting Dynamic Page Layouts (Upsert)" on page 177

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:

```
migrationtool -u UserID -s ServerURL Read DynamicLayout 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 471.

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:

```
migrationtool -u UserID -s ServerURL Read DynamicLayout Opportunity
```

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:

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

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:

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

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):

```
migrationtool -u UserID -s ServerURL Upsert DynamicLayout DynamicLayoutXML
```

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\DynamicLayout.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:\My
Files\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 179
- Privileges Required for Migrating Search Layouts on page 180
- Elements and Sections in the Search Layout XML Output File on page 180
- Migrating Search Layouts on page 186

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` *`SystemNameOfObject`* [*`SearchLayoutName`*]	This command extracts all of the custom search layouts for a specific record type (object), or a single custom layout (if the *SearchLayoutName* parameter is specified). The parameters are as follows: ■ *SystemNameOfObject* is the system name of a record type. The system names for the record types are listed in "System Names for Record Types" on page 471. ■ *SearchLayoutName* is the name of a search layout. This parameter is optional.
`ReadAll SearchLayout`	This command extracts all of the custom search layouts for all objects.
`Upsert SearchLayout` *`SearchLayoutXML`*	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
<data:SearchLayout> . . . </data:SearchLayout>	The <SearchLayout> section contains all of the information for a single search layout.
<data:SearchLayout> <data:ObjectName>Account </data:ObjectName> . . . </data:SearchLayout>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:SearchLayout> . . . <data:LayoutName>TestLayout </data:LayoutName> . . . </data:SearchLayout>	<LayoutName> contains the name of the layout.
<data:SearchLayout> . . . <data:LastUpdatedBy>10/17/2012 12:41:05 </data:LastUpdatedBy> . . . </data:SearchLayout>	<LastUpdatedBy> contains the date and time the layout was last updated.
<data:SearchLayout> . . . <data:Description>This is a test layout. </data:Description> . . . </data:SearchLayout>	<Description> contains the description for the layout.

Table 49. Elements and Sections in the Search Layout XML File

Element or Section	Description
<data:SearchLayout> . . . <data:ListOfSpecifySearchFields> . . . </data:ListOfSpecifySearchFields> . . . </data:SearchLayout>	The <ListOfSpecifySearchFields> section contains the details of the search fields for the layout.
<data:SearchLayout> . . . <data:ListOfSpecifySearchFields> <data:SearchLayoutField> <data:FieldName>Name_Shadow </data:FieldName> <data:SearchOptimization>2 </data:SearchOptimization> <data:Section>1</data:Section> <data:Order>0</data:Order> </data:SearchLayoutField> . . . </data:ListOfSpecifySearchFields> . . . </data:SearchLayout>	The <SearchLayoutField> section includes the following elements for a single search field: ■ <FieldName> contains the system name of the field, which never changes. ■ <SearchOptimization> 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 "About the SearchOptimization Element" on page 186. ■ <Section> indicates which section of the search field layout the field appears in, as follows: ■ A value of 0 indicates that the field is in the Not Available Search Fields section. ■ A value of 1 indicates that the field is in the Targeted Search Fields section. ■ A value of 2 indicates that the field is in the Additional Search Fields section. ■ The <Order> 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.

Table 49. Elements and Sections in the Search Layout XML File

Element or Section	Description
<data:SearchLayout> . . . <data:ListOfDefineSearchResultsLayout> . . . <data:ListOfDefineSearchResultsLayout> . . . </data:SearchLayout>	The <ListOfDefineSearchResultsLayout> section contains the details of the search result fields for the layout.
<data:SearchLayout> . . . <data:ListOfDefineSearchResultsLayout> <data:SearchLayoutField> <data:FieldName>Name_Shadow </data:FieldName> <data:SearchOptimization>2 </data:SearchOptimization> <data:Section>1</data:Section> <data:Order>0</data:Order> </data:SearchLayoutField> </data:ListOfDefineSearchResultsLayout> . . . </data:SearchLayout>	The <SearchLayoutField> section includes the following elements for a single search result field: ■ <FieldName> is the name of the field. ■ <SearchOptimization> 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 "About the SearchOptimization Element" on page 186. ■ <Section> indicates which section of the search results layout the field appears in, as follows: ■ A value of 0 indicates that the field is in the Not Available Search Results Fields section. ■ A value of 1 indicates that the field is in the Lookup Window Search Results Fields section. ■ A value of 2 indicates that the field is in the Additional Search Results Fields section. ■ <Order> 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.

Table 49. Elements and Sections in the Search Layout XML File

Element or Section	Description
<data:SearchLayout> . . . <data:RestrictSearchToFieldsSelectedInRelatedInformationLayout>false </data:RestrictSearchToFieldsSelectedInRelatedInformationLayout> . . . </data:SearchLayout>	<RestrictSearchToFieldsSelectedInRelatedInformationLayout> corresponds to the Restrict Search to Fields Selected in Related Information Layout check box in the UI. In certain cases where a field is not displayed in a list of related records, the setting in this check box is considered to determine if the field is available as a search field for searches of related records even though the field is not displayed in the list of related records.
<data:SearchLayout> . . . <data:EnableDivisionAsDefaultSearchField> false </data:EnableDivisionAsDefaultSearchField> . . . </data:SearchLayout>	<EnableDivisionAsDefaultSearchField> 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. 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. If this element is set to false, then the Product Name field is the default search field, unless the <EnableFirstTargetedFieldAsLookupDefault> 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.

Table 49. Elements and Sections in the Search Layout XML File

Element or Section	Description
<data:SearchLayout> . . . <data:EnableDefaultFields>true </data:EnableDefaultFields> . . . </data:SearchLayout>	<EnableDefaultFields> 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: ■ 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. ■ 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.
<data:SearchLayout> . . . <data:EnableDefaultSearchResults>true </data:EnableDefaultSearchResults> . . . </data:SearchLayout>	<EnableDefaultSearchResults> 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).
<data:SearchLayout> . . . <data:EnableAutoResolve>true </data:EnableAutoResolve> . . . </data:SearchLayout>	<EnableAutoResolve> 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 *Oracle CRM On Demand Online Help*.

Table 49. Elements and Sections in the Search Layout XML File

Element or Section	Description
<data:SearchLayout> . . . <data:EnableDefaultCtxSensitiveList> false </data:EnableDefaultCtxSensitiveList> . . . </data:SearchLayout>	<EnableDefaultCtxSensitiveList> 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). **NOTE:** 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.
<data:SearchLayout> . . . <data:EnableKeywordSearch>false </data:EnableKeywordSearch> . . . </data:SearchLayout>	<EnableKeywordSearch> corresponds to the Configure Enhanced Keword Search with Selected Search Results Fields check box in the UI. It determines which fields appear in the search results when an ehanced keyword search is performed for the record type, as follows: ■ 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. ■ If this element is set to false, then a predefined set of fields is displayed in the results of an enhanced keyword search.

Table 49. Elements and Sections in the Search Layout XML File

Element or Section	Description
<data:SearchLayout> . . . <data:EnableFirstTargetedFieldAsLookup Default>false </data:EnableFirstTargetedFieldAsLookup Default> . . . </data:SearchLayout>	<EnableFirstTargetedFieldAsLookupDefault> 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). **NOTE:** For the Product record type only, the setting in the <EnableDivisionAsDefaultSearchField> element takes precedence over the setting of the <EnableFirstTargetedFieldAsLookupDefault> element.

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 187

- "Extracting All Search Layouts for a Single Object" on page 187
- "Extracting All Search Layouts for All Objects" on page 188
- "Updating or Inserting a Search Layout (Upsert)" on page 189

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:

```
migrationtool -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 471.
- *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:

```
migrationtool -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:

```
migrationtool -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 471.

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:

```
migrationtool -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:

```
migrationtool -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 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:

```
migrationtool -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:

  ```
  migrationtool -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:

```
migrationtool -u UserID -s ServerURL Upsert SearchLayout "C:\Oracle Migration Tool On Demand\repository\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 191
- Privileges Required for Migrating Roles on page 191
- Elements and Sections in the Roles XML Output File on page 192
- Migrating Roles on page 198

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 198.

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. **NOTE:** 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. To update the <ExpirePasswordIn> element, the Manage Company privilege is required.

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
<data:RoleName>MyCustomRole</data:RoleName>	<RoleName> contains the system name of the role.
<data:Description>OnDemand Role</data:Description>	<Description> contains the description for the role.
<data:DefaultSalesProcess>Default Sales Process </data:DefaultSalesProcess>	<DefaultSalesProcess> contains the name of the default sales process specified for the role.
<data:ThemeName>Oracle</data:ThemeName>	<ThemeName> 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.
<data:ModernThemeName>Oracle Blue - Modern </data:ModernThemeName>	<ModernThemeName> 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.
<data:LeadConversionLayout> </data:LeadConversionLayout>	<LeadConversionLayout> contains the name of the lead conversion layout specified for the role.
<data:ActionBarLayout>Action Bar Standard Layout </data:ActionBarLayout>	<ActionBarLayout> contains the name of the Action bar layout specified for the role.
<data:RelatedInfoFormat>Tabs</data:RelatedInfoFormat>	<RelatedInfoFormat> specifies the format for related information sections on record detail pages, which can be shown as lists or as tabs.

Table 51. Elements and Sections in the Roles XML Output File

Element or Section	Description
<data:ExpirePasswordIn></data:ExpirePasswordIn>	<ExpirePasswordIn> specifies the length of time that a password is valid for a user who has this role. After this period has elapsed, the user is forced to change the password. If no value is specified, then the password expiry period that is defined for the company applies to the users who have this role. Valid values are: ■ 30 days ■ 60 days ■ 90 days ■ 180 days ■ One Year ■ Never expires
<data:LimitRecordsInListExport> </data:LimitRecordsInListExport>	<LimitRecordsInListExport> specifies the number of records that users who have this role can export at one time when exporting a list of records through the Export List menu option on List pages. By default, no restriction is applied and this element is empty. **NOTE:** The restriction, if specified, applies only to exports that are performed through the Export List menu option on List pages. It does not apply to export operations that are performed through the Export Assistant or through any other channel.
<data:ListOfRoleTranslation> . . . </data:ListOfRoleTranslation>	The <ListOfRoleTranslation> section contains the translation values for the role.

Table 51. Elements and Sections in the Roles XML Output File

Element or Section	Description
<data:ListOfRoleTranslation> <data:RoleTranslation> <data:LanguageCode>ENU</data:LanguageCode> <data:RoleName>My Custom Role</data:RoleName> </data:RoleTranslation> . . . </data:ListOfRoleTranslation>	The <RoleTranslation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter code for a language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <RoleName> contains the name for the role in the language identified by the language code.
<data:ListOfRecordTypeAccess> . . . </data:ListOfRecordTypeAccess>	The <ListOfRecordTypeAccess> section lists the record-type Access defined for each record type for the role.
<data:ListOfRecordTypeAccess> <data:RecordTypeAccess> <data:RecordName>CustomObject10</data:RecordName> <data:HasAccess>true</data:HasAccess> <data:CanCreate>true</data:CanCreate> <data:CanReadAll>true</data:CanReadAll> </data:RecordTypeAccess> <data:RecordTypeAccess> <data:RecordName>Account</data:RecordName> <data:HasAccess>true</data:HasAccess> <data:CanCreate>true</data:CanCreate> <data:CanReadAll>true</data:CanReadAll> </data:RecordTypeAccess> . . . </data:ListOfRecordTypeAccess>	The <RecordTypeAccess> section specifies the record-type Access defined for each record type for users who have this role, as follows: ■ <RecordName> contains the system name of the record type (object), which never changes. The system names for the record types are listed in "System Names for Record Types" on page 471. ■ <HasAccess> determines whether the user has access to the records of the specified record type (true) or does not have access to records of the specified record type (false). ■ <CanCreate> determines whether the user can create records of the specified record type (true) or cannot create records of the specified record type (false). ■ <CanReadAll> determines whether the user has read all records of the specified record type (true) or does not have access to all records of the specified record type (false).

Table 51. Elements and Sections in the Roles XML Output File

Element or Section	Description
<data:AccessProfile> <data:DefaultAccessProfile>Administrator Default Access Profile</data:DefaultAccessProfile> <data:OwnerAccessProfile>Administrator Owner Access Profile</data:OwnerAccessProfile> </data:AccessProfile>	The <AccessProfile> section specifies the access profiles that are assigned to the role, as follows: ■ <DefaultAccessProfile> contains the name of the default access profile for the role. ■ <OwnerAccessProfile> contains the name of the owner access profile for the role.
<data:ListOfPrivilege> . . . </data:ListOfPrivilege>	The <ListofPrivilege> section specifies the privilege settings for the role.
<data:ListOfPrivilege> <data:Privilege> <data:PrivilegeName>ACCESS_ATT_EXPORT</data:PrivilegeName> <data:Enabled>false</data:Enabled> </data:Privilege> . . . </data:ListOfPrivilege>	The <Privilege> section specifies the details of one privilege for the role: ■ <Privilege> contains the system name of the privilege. For information about privilege IDs, their corresponding names, and descriptions, see "Privilege IDs and Their Corresponding Names and Descriptions" on page 501. ■ <Enabled> specifies whether the privilege is enabled for the role (true) or is not enabled for the role (false).
<data:TabAccessAndOrder> . . . </data:TabAccessAndOrder>	The <TabAccessAndOrder> section contains the details of the tab access and order for the role.
<data:TabAccessAndOrder> <data:ListOfAvailableTab> <data:AvailableTab>Account</data:AvailableTab> <data:AvailableTab>Forecasts</data:AvailableTab> <data:AvailableTab>Leads</data:AvailableTab> . . . </data:ListOfAvailableTab> . . . </data:TabAccessAndOrder>	The <ListofAvailableTab> section contains the details of the tabs that are available to users who have this role, but are not displayed by default. This section corresponds to the Available Tabs list in the Role Management wizard. The <AvailableTab> child element contains the system name of the record type for the tab. For more information about mapping the XML values from the <AvailableTab> element to their corresponding UI names, see Table 91 on page 471.

Table 51. Elements and Sections in the Roles XML Output File

Element or Section	Description
<data:TabAccessAndOrder> . . . <data:ListOfSelectedTab> <data:SelectedTab> <data:TabName>Home</data:TabName> <data:Order>0</data:Order> </data:SelectedTab> <data:SelectedTab> <data:TabName>Accounts</data:TabName> <data:Order>1</data:Order> </data:SelectedTab> <data:SelectedTab> <data:TabName>Contacts</data:TabName> <data:Order>2</data:Order> </data:SelectedTab> <data:SelectedTab> <data:TabName>Leads</data:TabName> <data:Order>3</data:Order> </data:SelectedTab> . . . </data:ListOfSelectedTab> </data:TabAccessAndOrder>	The <List of Selected Tab> section contains the details of the tabs that are displayed by default for users who have this role. This section corresponds to the Selected Tabs list in the Role Management wizard. The elements in the section are: ■ <TabName> contains the system name of the record type for the tab. ■ <Order> indicates the order of the tab in the Selected Tabs list. The order of value 0 (zero) corresponds to the first tab in the Selected Tabs section in the UI. For more information about mapping the XML values from the <TabName> element to their corresponding UI names, see Table 91 on page 471.
<data:ListOfPageLayoutAssignment> . . . </data:ListOfPageLayoutAssignment>	The <ListOfPageLayoutAssignment> section contains the details of the page layout assignments for the role.

Table 51. Elements and Sections in the Roles XML Output File

Element or Section	Description
<data:ListOfPageLayoutAssignment> <data:PageLayoutAssignment> <data:RecordType>UserAdmin</data:RecordType> <data:LayoutName></data:LayoutName> <data:PageViewType>Static</data:PageViewType> </data:PageLayoutAssignment> <data:PageLayoutAssignment> <data:RecordType>Account</data:RecordType> <data:LayoutName></data:LayoutName> <data:PageViewType>Static</data:PageViewType> </data:PageLayoutAssignment> . . . </data:ListOfPageLayoutAssignment>	The <PageLayoutAssignment> section contains the details of the page layout assignment for one record type for the role: ■ <RecordType> is the system name of the record type (object), which never changes. For more information about mapping the XML values from the <RecordType> element to their corresponding UI names, see Table 91 on page 471. ■ <LayoutName> specifies the name of the page layout for the record type for this role. If the <LayoutName> element is not specified, then the default layout is applied. If the <PageViewType> has the Dynamic value, then the layout specified in the <LayoutName> must be a dynamic layout. For more information about dynamic page layouts, see "Migrating Dynamic Page Layouts" on page 173. ■ <PageViewType> specifies whether the page layout is a static layout or a dynamic layout. The <PageViewType> element value must be either Static or Dynamic.
<data:ListOfSearchLayoutAssignment> . . . </data:ListOfSearchLayoutAssignment>	The <ListOfSearchLayoutAssignment> section contains the details of the search layout assignments for the role.

Table 51. Elements and Sections in the Roles XML Output File

Element or Section	Description
<data:ListOfSearchLayoutAssignment> <data:SearchLayoutAssignment> <data:RecordType>Account</data:RecordType> <data:LayoutName>AccountSearch</data:LayoutName> </data:SearchLayoutAssignment> <data:SearchLayoutAssignment> <data:RecordType>Opportunity</data:RecordType> <data:LayoutName></data:LayoutName> </data:SearchLayoutAssignment> . . . </data:ListOfSearchLayoutAssignment>	The <SearchLayoutAssignment> section contains the details of the page layout assignment for one record type for the role: ■ <RecordType> is the system name of the record type (object), which never changes. For more information about mapping the XML values from the <RecordType> element to their corresponding UI names, see Table 91 on page 471. ■ <LayoutName> specifies the name of the search layout for the record type for this role.
<data:ListOfHomepageLayoutAssignment> . . . </data:ListOfHomepageLayoutAssignment>	The <ListOfHomePageLayoutAssignment> section contains details of the homepage layout assignments for the role.
<data:ListOfHomepageLayoutAssignment> <data:HomepageLayoutAssignment> <data:RecordType>Homepage</data:RecordType> <data:LayoutName>My Homepage Custom Layout </data:LayoutName> </data:HomepageLayoutAssignment> <data:HomepageLayoutAssignment> <data:RecordType>Program</data:RecordType> <data:LayoutName></data:LayoutName> </data:HomepageLayoutAssignment> <data:HomepageLayoutAssignment> <data:RecordType>Partner</data:RecordType> <data:LayoutName></data:LayoutName> </data:HomepageLayoutAssignment> <data:HomepageLayoutAssignment> <data:RecordType>Account</data:RecordType> <data:LayoutName>My Custom Account Homepage Layout </data:LayoutName> </data:HomepageLayoutAssignment> . . . </data:ListOfHomepageLayoutAssignment>	The <HomepageLayoutAssignment> section contains the details of the homepage layout assignment for one record type for the role: ■ <RecordType> is the system name of the record type (object), which never changes. For more information about mapping the XML values from the <RecordType> element to their corresponding UI names, see Table 91 on page 471. ■ <LayoutName> specifies the name of the homepage layout for the record type for this role.

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 199

■ “Updating or Inserting a Specific Role (Upsert)” on page 199

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:

```
migrationtool -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:

```
migrationtool -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):

```
migrationtool -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:

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

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

21 Migrating Integration Event Queue Configuration Data

This chapter describes how to migrate the integration event queue configuration data using the Oracle Migration Tool On Demand client. It contains the following topics:

- Integration Event Queues on page 201
- Privileges Required for Migrating Integration Event Queue Configuration Data on page 202
- Elements and Sections in the Integration Event Queue XML Output File on page 202
- Migrating Integration Event Queue Configuration Data on page 205
- About Clearing Transactions from Integration Event Queues on page 208

Integration Event Queues

The integration events that are generated by workflow Create Integration Event actions are written to integration event queues. A default integration event queue (named Default Queue) is provided with Oracle CRM On Demand. However, you can also create additional queues. For more information about integration event queues, see *Oracle CRM On Demand Online Help*.

Table 52 describes the Oracle Migration Tool On Demand client commands used with the integration event queue configuration data. These commands are case sensitive.

Table 52. Commands Used with Integration Event Queue Configuration Data in Oracle Migration Tool On Demand

Command	Description
`Read IntegrationEventQueue` *`QueueName`*	This command extracts the configuration data for the specified integration event queue. *QueueName* is the name of an integration event queue.
`ReadAll IntegrationEventQueue`	This command extracts the configuration data for all of the integration event queues.
`Upsert IntegrationEventQueue` *`IntegrationEventQueueXML`*	This command updates or inserts an integration event queue.

Privileges Required for Migrating Integration Event Queue 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. In addition, Integration Event Administration must be set up for your company.
- For the Upsert command: Enable Web Services Access, and Manage Company.

In addition, to use the Read, ReadAll, and Upsert commands, Integration Event Administration must be set up for your company.

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

Elements and Sections in the Integration Event Queue XML Output File

Table 53 describes the elements and sections in the integration event queue XML output file.

Table 53. Elements and Sections in the Integration Event Queue XML File

Element or Section	Description
<data:IntegrationEventQueue> . . . </data:IntegrationEventQueue>	The <IntegrationEventQueue> section contains all of the information for a single integration event queue.
<data:IntegrationEventQueue> <data:QueueName>TestQueue </data:QueueName> . . . </data:IntegrationEventQueue>	<QueueName> contains the name of the integration event queue.
<data:IntegrationEventQueue> . . . <data:Description>MyTestQueue </data:Description> . . . </data:IntegrationEventQueue>	<Description> contains the description of the integration event queue.
<data:IntegrationEventQueue> . . . <data:Disabled>false</data:Disabled> . . . </data:IntegrationEventQueue>	<Disabled> specifies whether the integration event queue is disabled (true) or is not disabled (false).

Table 53. Elements and Sections in the Integration Event Queue XML File

Element or Section	Description
<data:IntegrationEventQueue> . . . <data:Created>SysAdmin, 05/21/2017 04:40:52</data:Created> . . . </data:IntegrationEventQueue>	<Created> contains the user name of the user who created the integration event queue, with the date and time that the queue was created. This element is read-only and is ignored for upsert requests.
<data:IntegrationEventQueue> . . . <data:Modified>SysAdmin, 06/19/2017 06:26:52</data:Modified> . . . </data:IntegrationEventQueue>	<Modified> contains the user name of the user who last modified the integration event queue configuration, with the date and time that the queue configuration was last modified. This element is read-only and is ignored for upsert requests.
<data:IntegrationEventQueue> . . . <data:FileLimit>500 </data:FileLimit> . . . </data:IntegrationEventQueue>	<FileLimit> shows the total number of events that your company can store for all queues. If the combined size of the existing queues matches this number, then you cannot create a new queue. This element is read-only and is ignored for upsert requests.
<data:IntegrationEventQueue> . . . <data:UnassignedQueueCapacity>70 </data:UnassignedQueueCapacity> . . . </data:IntegrationEventQueue>	<UnassignedQueueCapacity> shows the remaining capacity for all integration event queues. This element is read-only and is ignored for upsert requests.
<data:IntegrationEventQueue> . . . <data:QueueSize>10</data:QueueSize> . . . </data:IntegrationEventQueue>	<QueueSize> specifies the size of the queue. When you create a new queue, the size of the queue cannot exceed the remaining capacity, which is shown in the <UnassignedQueueCapacity> element.
<data:IntegrationEventQueue> . . . <data:NumberOfTransactions>0 </data:NumberOfTransactions> . . . </data:IntegrationEventQueue>	<NumberOfTransactions> shows the number of transactions currently in the queue. This element is read-only and is ignored for upsert requests. **NOTE:** For information about clearing integration events from queues, see “About Clearing Transactions from Integration Event Queues” on page 208.
<data:IntegrationEventQueue> . . . <data:NotificationEmailAddress> jane.doe@company.com </data:NotificationEmailAddress> . . . </data:IntegrationEventQueue>	<NotificationEmailAddress> is the email address to which a warning email is to be sent when the queue is full or when the queue reaches a certain size, if a warning email is to be sent.

Table 53. Elements and Sections in the Integration Event Queue XML File

Element or Section	Description
<data:IntegrationEventQueue> . . . <data:WarningMailQueueSize>5 </data:WarningMailQueueSize> . . . </data:IntegrationEventQueue>	<WarningMailQueueSize> specifies the size that the queue is allowed to reach before a warning email is sent to the address specified in the <NotificationEmailAddress> element.
<data:IntegrationEventQueue> . . . <data:TimeZone>User Time Zone </data:TimeZone> </data:IntegrationEventQueue>	<TimeZone> specifies how the dates and times are recorded in the integration events. The valid values are: ■ **UTC Format.** If this value is specified, then the date and time in the GMT time zone are recorded, in the format specified by the W3C standard for Coordinated Universal Time (UTC), as follows: YYYY-MM-DDTHH:MM:SSZ For example, 2017-06-12T09:44:15Z, which corresponds to June 12th 2017, 9:44:15 GMT. **NOTE:** Fractions of seconds are not recorded. ■ **UTC.** If this value is specified, then the date and time in the GMT time zone are recorded, in the following format: MM/DD/YYYY HH:MM:SS For example, 06/12/2017 09:44:15, which corresponds to June 12th 2017, 9:44:15 GMT. ■ **User Time Zone.** If this value is specified, then the date and time in the time zone of the user who updated the record are recorded, in the following format: MM/DD/YYYY HH:MM:SS For example, 06/12/2017 09:44:15, which corresponds to June 12th 2017, 9:44:15, in the user's time zone. **NOTE:** You can set the Time Zone field for the Default Queue only. All other queues inherit the setting that is selected for the Default Queue.

Table 53. Elements and Sections in the Integration Event Queue XML File

Element or Section	Description
<data:IntegrationEventQueue> . . . <data:PicklistFormat>User Language </data:PicklistFormat> . . . </data:IntegrationEventQueue>	<PicklistFormat> specifies the format for recording picklist field values in the integration events, as follows: ■ **LIC.** If this value is specified, then the picklist values are recorded as language-independent code (LIC) values. **NOTE:** The LIC values in picklists are usually the same as the values in the English-United States (ENU) locale. ■ **User Language.** If this value is specified, then the picklist values are recorded in the language of the user whose action causes the integration event to be created. **NOTE:** After a queue is created, the Picklist Format field becomes read-only and you cannot change it, either in the UI or through an upsert operation. If you want to change the picklist format of an integration event queue, then contact Oracle CRM On Demand Customer Care, and ask them to change it for you.

Migrating Integration Event Queue Configuration Data

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate integration event queue configuration data:

■ "Extracting a Single Integration Event Queue" on page 205

■ "Extracting All Integration Event Queues" on page 206

■ "Updating or Inserting an Integration Event Queue (Upsert)" on page 207

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

Extracting a Single Integration Event Queue

This topic describes how to extract the configuration data for a single integration event queue 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/IntegrationEventQueue/*queuename*.xml

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the configuration data for a single integration event queue:

migrationtool -u *UserID* -s *ServerURL* Read IntegrationEventQueue *QueueName*

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.
- *QueueName* is the name of the integration event queue for which you want to extract the 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 a Single Integration Event Queue

The following is an example of extracting the configuration data for a single integration event queue:

migrationtool -u *UserID* -s *ServerURL* Read IntegrationEventQueue "My Queue"

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

Extracting All Integration Event Queues

This topic describes how to extract the configuration data for all of the integration event queues 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 configuration data for all of the integration event queues:

migrationtool -u *UserID* -s *ServerURL* ReadAll IntegrationEventQueue

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 Integration Event Queue (Upsert)

This topic describes how to update the configuration data for an integration event queue (if the queue exists) or insert an integration event queue (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 integration event queue configuration data based on the user key: <QueueName>.

Oracle CRM On Demand attempts to locate the integration event queue specified in the input file based on the user key. If a match is located, then the configuration data for the integration event queue is updated. If Oracle CRM On Demand cannot locate an integration event queue based on the user key, then a new integration event queue is created.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update the configuration data for an event queue:

```
migrationtool -u UserID -s ServerURL Upsert IntegrationEventQueue
IntegrationEventQueueXML
```

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.
- *IntegrationEventQueueXML* is the fully qualified path name of the integration event queue XML file, for example:

  ```
  C:\My Files\MyQueue.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 IntegrationEventQueue "C:\My
  Files\MyQueue.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 Configuration Data for an Integration Event Queue

The following is an example of updating the configuration data for an integration event queue (if the queue exists) or inserting an integration event queue (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert IntegrationEventQueue "C:\Oracle
Migration Tool On Demand\repository\IntegrationEventQueue\MyQueue.xml"
```

NOTE: Quotation marks are required only if the fully qualified path name contains spaces.

About Clearing Transactions from Integration Event Queues

You can use the Upsert command to clear transactions from an integration event queue. You can clear all transactions from the queue by including the <ClearAllTransactions> element in the XML file for the upsert operation, with the value set to true, as follows:

```
<data:ClearAllTransactions>true</data:ClearAllTransactions>
```

Alternatively, you can clear older transactions from the queue by including the <ClearFromDate> element in the XML file for the upsert operation, with the value set to a date and time. The upsert operation clears all of the transactions that occurred before that date and time from the queue.

In the <ClearFromDate> element, you must use the date and time format specified by the W3C standard. The format is:

YYYY-*MM*-*DD*T*HH*:*MM*:*SS*

In the string:

- *YYYY* specifies the year
- *MM* specifies the month
- *DD* specifies the day
- T indicates the start of the required time section
- *HH* specifies the hour
- *MM* specifies the minute
- *SS* specifies the second

If you express the time in UTC (Coordinated Universal Time), then append the letter Z to the string, as shown in the following example:

```
2002-05-30T09:30:10Z
```

If you express the time in a time zone other than UTC, then you must specify the positive or negative offset from UTC in hours and minutes, as shown in the following examples.

This example shows a time expressed in UTC:

```
2002-05-30T09:30:10Z
```

The following example shows the same moment expressed in a time zone that is six hours behind UTC:

```
2002-05-30T03:30:10-06:00
```

The following example shows the same moment expressed in a time zone that is six hours ahead of UTC:

```
2002-05-30T15:30:10+06:00
```

NOTE: Unless the <ClearAllTransactions> element is included in the XML file and is set to true, or the <ClearFromDate> element is included in the XML file with a date and time specified, any transactions currently in the queue are not affected by the upsert operation.

22 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 212
- Workflow Action Sets on page 215
- Privileges Required for Migrating Workflow Rules and Action Sets on page 217
- Elements and Sections in the Workflow Rules Output File on page 218
- Elements and Sections in the Workflow Action Sets Output File on page 223
- Migrating Workflow Rules on page 240
- Migrating Workflow Action Sets on page 245

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 54 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 240.

Table 54. Oracle Migration Tool On Demand Commands for Workflow Rules

Command	Description
`Read WorkflowRuleSet` *`RecordType TriggerEvent`* [*`ParentRecordType`*] [*`WorkflowName`*]	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: ■ *RecordType* 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 *RecordType* parameter. ■ *TriggerEvent* is the code for the trigger event, see Table 55 on page 215. 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 *TriggerEvent* parameter. ■ *ParentRecordType* 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 *ParentRecordType* parameter. ■ *WorkflowName* is the name of the workflow rule. You can read an individual workflow rule by specifying a value for the *WorkflowName* parameter.
`ReadAll WorkflowRuleSet`	This command exports all workflow rules from an Oracle CRM On Demand server.

Table 54. Oracle Migration Tool On Demand Commands for Workflow Rules

Command	Description
`Upsert WorkflowRuleSet` *`WorkflowRulesXML`*	This command updates or inserts a set of workflow rules on an Oracle CRM On Demand server. **NOTE:** 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 "Considerations That Apply to Upsert Operations" on page 214.
`Delete WorkflowRuleSet` *`RecordType TriggerEvent`* [*`ParentRecordType`*] [*`WorkflowName`*]	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: ■ *RecordType* 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 *RecordType* parameter. ■ *TriggerEvent* is the code for the trigger event, see Table 55 on page 215. 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 *TriggerEvent* parameter. ■ *ParentRecordType* 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 *ParentRecordType* parameter. ■ *WorkflowName* is the name of the workflow rule. This parameter is optional. You can delete an individual workflow rule by specifying a value for the *WorkflowName* parameter.

Table 54. Oracle Migration Tool On Demand Commands for Workflow Rules

Command	Description
`InsertOrUpdate WorkflowRuleSet` *`WorkflowRulesXML`*	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. **NOTE:** 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 number.
- 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.

About Inserting, Updating, and Deleting Scheduled Events

A *scheduled event* is a workflow rule that is automatically executed when a specified date and time is reached. For more information about scheduled events, see *Oracle CRM On Demand Online Help*.

When you insert a new scheduled event record in a target environment, Oracle CRM On Demand generates a pending instance for the first scheduled occurrence of the event, if the scheduled event is active (that is, the <Active> element on the scheduled event record is set to true). If the scheduled event is not active, then a pending instance is not generated.

When you update a scheduled event record in a target environment, the following happens:

- Oracle CRM On Demand deletes any pending instance of the scheduled event in the target environment.
- If the scheduled event is active, then Oracle CRM On Demand generates a new pending instance for the next scheduled occurrence of the event.

When you delete a scheduled event record in a target environment, Oracle CRM On Demand deletes any pending instance of the scheduled event in the target environment.

Language-Independent Codes for Trigger Events

Table 55 maps the workflow trigger events to the trigger event language-independent code (LIC).

Table 55. 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
Scheduled Event	ScheduledEvent

Workflow Action Sets

A w*orkflow action set* is an ordered series of workflow actions of different types. The complete set of workflow actions is: CreateTask, Wait, SendEmail, CreateIntegrationEvent, FieldUpdate, AssignBook, SyncOwnerPartner, SyncBookPartner, SyncPartnerBooks, SubmitCall, and SubmitTransaction.

The SyncOwnerPartner, SyncBookPartner, and SyncPartnerBooks workflow actions are available only in Oracle CRM On Demand for Partner Relationship Management. For more information about these actions and how you can use them, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*, available from the Oracle CRM On Demand documentation library.

For more information about workflow actions, see *Oracle CRM On Demand Online Help*.

Table 56 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 245.

Table 56. Oracle Migration Tool On Demand Commands for Workflow Action Sets

Command	Description
Read WorkflowActionSet *WorkflowRuleName* [*WorkflowActionName*] [*ActiveFlag*]	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: ■ *WorkflowRuleName* is the name of the workflow rule. ■ *WorkflowActionName* 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 *ActiveFlag* argument to filter the workflow actions that are exported, then you must specify an empty value for the *WorkflowActionName* parameter. An empty value is specified as a set of double 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).
ReadForRuleSet WorkflowActionSet *RecordType TriggerEvent*	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.

Table 56. Oracle Migration Tool On Demand Commands for Workflow Action Sets

Command	Description
`Upsert WorkflowActionSet` *`WorkflowActionSetXML`*	This command updates or inserts a workflow action set on an Oracle CRM On Demand server. **NOTE:** 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.
`InsertOrUpdate WorkflowActionSet` *`WorkflowActionSetXML`*	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. **NOTE:** 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.

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 57 describes the elements and sections in the workflow rules XML file.

NOTE: Certain elements are applicable only for workflow rules that have the Scheduled Event trigger event. These elements are described in Table 58 on page 220.

Table 57. Elements and Sections in the Workflow Rules XML File

Element or Section	Description
`<data:TriggerEvent>WriteRecordNew</data:TriggerEvent>`	<TriggerEvent> specifies the trigger event code that triggers the workflow.
`<data:ParentRecordType></data:ParentRecordType>`	(Optional.) <ParentRecordType> specifies the system name of the parent record type. It is specified if the trigger event is Associate or Dissociate. See *Oracle CRM On Demand Online Help* or the Workflow UI for the valid combination of RecordType, TriggerEvent, and ParentRecordType.

`<data:WorkflowRule>`
`. . .`
`</data:WorkflowRule>`
	The <WorkflowRule> section contains the elements for one workflow rule.

`<data:WorkflowRule>`
`. . .`
`<data:WorkflowName>Opportunity Rule</data:WorkflowName>`
`. . .`
`/data:WorkflowRule>`
	<WorkflowName> specifies the name of the workflow rule. This field has a maximum of 50 characters.

`<data:WorkflowRule>`
`. . .`
`<data:Active>true</data:Active>`
`. . .`
`</data:WorkflowRule>`
	<Active> specifies whether the rule is active (true) or inactive (false).

`<data:WorkflowRule>`
`. . .`
`<data:Exit>false</data:Exit>`
`. . .`
`</data:WorkflowRule>`
	<Exit> specifies whether Oracle CRM On Demand exits the sequence of workflow rules after this rule is executed (true), or does not exit the sequence of workflow rules after this rule is executed (false).
	
	NOTE: For workflow rules that have the Scheduled Event trigger event, the <Exit> element is always set to true and is read-only.

Table 57. Elements and Sections in the Workflow Rules XML File

Element or Section	Description
<data:WorkflowRule> . . . <data:WorkflowRuleCondition>[{Primary Revenue Win Probability}]>=LookupValue("PROB", "90") </data:WorkflowRuleCondition> . . . </data:WorkflowRule>	<WorkflowRuleCondition> is a valid expression, as defined in the *Oracle CRM On Demand Online Help*, 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. **NOTE:** You cannot specify a condition for a workflow rule that has the Scheduled Event trigger event. If the <WorkflowRuleCondition> element is populated when you insert or update a workflow rule that has the Scheduled Event trigger event, then the element is ignored.
<data:WorkflowRule> . . . <data:CancelSave>false</data:CancelSave> . . . </data:WorkflowRule>	<CancelSave> is applicable only for workflow rules that have the Before Modified Record Saved trigger event. It specifies whether the Cancel Save processing is performed (true) if the condition on the workflow rule is not met, or is not performed (false). The Workflow Cancel Save privilege is required to insert or update a workflow rule set that contains the <CancelSave> element.
<data:WorkflowRule> . . . <data:Order>1</data:Order> . . . </data:WorkflowRule>	<Order> 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. **NOTE:** The <Order> element is read-only for workflow rules that have the Scheduled Event trigger event. Workflow rules that have the Scheduled Event trigger event are not performed as part of a sequence.
<data:WorkflowRule> . . . <data:DisplayMessage></data:DisplayMessage> . . . </data:WorkflowRule>	<DisplayMessage> is applicable only for workflow rules that have the Before Modified Record Saved trigger event. It specifies the message that is returned to the user or Web service if the condition on the rule is not met, and <CancelSave> is set to true for the rule. This field has a maximum of 1999 characters.

Table 57. Elements and Sections in the Workflow Rules XML File

Element or Section	Description
<data:WorkflowRule> . . . <data:Description>Workflow Rule for new opportunities with probability at 90% or higher </data:Description> </data:WorkflowRule>	<Description> contains additional information about the workflow rule.
<data:ListOfWorkflowTranslations> . . . </data:ListOfWorkflowTranslations>	The <ListofWorkflowTranslations> section is applicable only for workflow rules that have the Before Modified Record Saved trigger event. It contains the translation values for the workflow Cancel Save message.
<data:ListOfWorkflowTranslations> <data:WorkflowTranslation> <data:LanguageCode>ENU</data:LanguageCode> <data:DisplayMessageTranslation>This Record can not be updated, since workflow Cancel Save (Acc_WF_2) is in Active status. </data:DisplayMessageTranslation> </data:WorkflowTranslation> <data:WorkflowTranslation> <data:LanguageCode>ENG</data:LanguageCode> <data:DisplayMessageTranslation>This Record can not be updated. </data:DisplayMessageTranslation> </data:WorkflowTranslation> . . . </data:ListOfWorkflowTranslations>	The <WorkflowTranslation> section is applicable only for workflow rules that have the Before Modified Record Saved trigger event. It contains the translation values of the workflow Cancel Save message for one language: ■ <LanguageCode> contains the three-letter language code for a language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <DisplayMessageTranslation> contains the message in the language identified by the language code.

Table 58 describes the elements that are applicable only for workflow rules that have the Scheduled Event trigger event.

Table 58. Additional Elements for Scheduled Events

Element or Section	Description
<data:WorkflowRule> . . . <data:StartDateTime>05/10/2018 12:00:00 </data:StartDateTime> . . . </data:WorkflowRule>	<StartDateTime> specifies the date and time when the first instance of the scheduled event is to be executed. **NOTE:** If the scheduled event already exists and is active in the target environment, then <StartDateTime> is read-only.

Table 58. Additional Elements for Scheduled Events

Element or Section	Description
<data:WorkflowRule> . . . <data:EndDateTime>07/10/2018 12:00:00 </data:EndDateTime> . . . </data:WorkflowRule>	<EndDateTime> specifies the date and time after which no further instances of the scheduled event are to be executed. If the <NumOccurrence> and <EndDateTime> elements both contain a value when you update or insert a scheduled event, then only the value in the <EndDateTime> element is written to the scheduled event. **NOTE:** If the scheduled event already exists and is active in the target environment, then <EndDateTime> is read-only.
<data:WorkflowRule> . . . <data:RecurrenceType>Monthly </data:RecurrenceType> . . . </data:WorkflowRule>	<RecurrenceType> corresponds to the Recurring field in the UI. It specifies the interval at which the scheduled event is to repeat. Valid values are Hourly, Daily, Weekly, Monthly, and Yearly. **NOTE:** If the scheduled event already exists and is active in the target environment, then <RecurrenceType> is read-only.
<data:WorkflowRule> . . . <data:RecurrencePeriod>1 </data:RecurrencePeriod> . . . </data:WorkflowRule>	<RecurrencePeriod> corresponds to the Every field in the UI. It specifies the interval period for the recurring instances of the scheduled event. Only positive integers are valid and the minimum allowed value is 1. **NOTE:** If the scheduled event already exists and is active in the target environment, then <RecurrencePeriod> is read-only.
<data:WorkflowRule> . . . <data:LastDayOfMonth>true </data:LastDayOfMonth> . . . </data:WorkflowRule>	If the <RecurrenceType> element is set to Monthly, then the <LastDayOfMonth> element specifies whether each instance of the scheduled event is to be executed on the last day of any month in which it is executed (true), or on the day of the month specified in the <StartDateTime> element (false). The <LastDayOfMonth> element is not applicable if the <RecurrenceType> element is set to anything other than Monthly. **NOTE:** If the scheduled event already exists and is active in the target environment, then <LastDayOfMonth> is read-only.

Table 58. Additional Elements for Scheduled Events

Element or Section	Description
<data:WorkflowRule> . . . <data:NumOccurrence/> . . . </data:WorkflowRule>	<NumOccurrence> corresponds to the After field in the UI. It specifies the number of times that the scheduled event is to be executed. The <EndDateTime> element takes precedence over the <NumOccurrence> element. If both of these elements contain a value when you update or insert a scheduled event, then only the value in the <EndDateTime> element is written to the scheduled event. **NOTE:** If the scheduled event already exists and is active in the target environment, then <NumOccurrence> is read-only.
<data:WorkflowRule> . . . <data:ListName>All Top Accounts</data:ListName> . . . </data:WorkflowRule>	<ListName> specifies the filtered list that returns the records on which the workflow actions act. If the user who activated the scheduled event has access to more than one list with the same name as the list specified on the scheduled event, then the most personalized list with that name is used. For example, if the user has a private list with a given name and also has access to a role-specific list with the same name, then the private list is used when the instance of the scheduled event is executed. **NOTE:** If the scheduled event already exists and is active in the target environment, then <ListName> is read-only.
<data:WorkflowRule> . . . <data:ScheduledInstancesInitiatedByUser>1QA2-HQOHK</data:ScheduledInstancesInitiatedByUser> . . . </data:WorkflowRule>	<ScheduledInstancesInitiatedByUser> corresponds to the Initiated By field in the UI. This element is read-only. **NOTE:** Up to the time that a scheduled event is made active, the Initiated By field on the scheduled event record shows the name of the user who created the scheduled event. After the event is made active, the Initiated By field is updated to show the name of the user who made the event active.

Table 58. Additional Elements for Scheduled Events

Element or Section	Description
<data:WorkflowRule> . . . <data:ScheduledEventStatus/> . . . </data:WorkflowRule>	<ScheduledEventStatus> specifies the current status of the scheduled event. This element is read-only. The valid values are: ■ **Not Scheduled.** The scheduled event is not active and there is no pending instance of the event. ■ **Scheduled.** The scheduled event is active and a pending instance of the event exists. ■ **Completed.** All of the scheduled occurrences of the scheduled event have completed. ■ **Terminated.** The most recently generated instance of the scheduled event was deleted from the Workflow Wait Monitor, or the scheduled event has been deactivated.
<data:WorkflowRule> . . . <data:EnableNotification>false </data:EnableNotification> . . . </data:WorkflowRule>	<EnableNotification> specifies whether Oracle CRM On Demand is to send an email notification to the user who activated the scheduled event when any of the following happens: ■ An instance of the scheduled event completes successfully. ■ An instance of the scheduled event fails. ■ An instance of the scheduled event is deleted from the Workflow Wait Monitor. If this element is set to true, then an email notification is sent. If this element is set to false, then an email notification is not sent.

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 224
- "Send Email Workflow Action Set" on page 226
- "Create Task Workflow Action Set" on page 230
- "Wait Action Workflow Action Set" on page 234
- "Field Update Workflow Action Set" on page 235
- "Create Integration Event Workflow Action Set" on page 237

■ "Submit Call Workflow Action Set" on page 239

■ "Submit Workflow Action Set" on page 240

Assign a Book Workflow Action Set

Table 59 describes the elements and sections in the Assign a Book workflow action set XML output file.

Table 59. Elements and Sections in the Assign a Book Workflow Action Set XML File

Element or Section	Description
<data:WorkflowName>Opportunity Rule </data:WorkflowName>	<WorkflowName> 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.
<data:WorkflowAction> . . . </data:WorkflowAction>	The <WorkflowAction> section contains the details of the workflow action.
<data:WorkflowAction> <data:Name>BookAssignTest </data:Name> . . . </data:WorkflowAction>	<Name> is the name of the workflow action.
<data:WorkflowAction> . . . <data:Active>true</data:Active> . . . </data:WorkflowAction>	<Active> specifies whether the workflow action is active (true) or inactive (false).
<data:WorkflowAction> . . . <data:Order>1</data:Order> . . . </data:WorkflowAction>	<Order> 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.
<data:WorkflowAction> . . . <data:WorkflowAssignBookAction> . . . </data:WorkflowAssignBookAction> </data:WorkflowAction>	The <WorkflowAssignBookAction> section contains the details of the Assign a Book workflow action.

Table 59. Elements and Sections in the Assign a Book Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:WorkflowAssignBookAction> <data:BookName>MyBook</data:BookName> <data:BookExpr/> . . . </data:WorkflowAssignBookAction> </data:WorkflowAction>	If the <AssignmentOption> element value is anything other than Remove all, then either the <BookName> element or the <BookExpr> element is required, to specify the target book. The *target book* 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: ■ <BookName> optionally specifies the name of the target book. ■ <BookExpr> optionally contains an expression that evaluates to the name of a book. **NOTE:** If the <BookName> and <BookExpr> elements both contain a value in an input file for an Upsert or InsertOrUpdate command, then only the value of the <BookName> element is saved in Oracle CRM On Demand.
<data:WorkflowAction> . . . <data:WorkflowAssignBookAction> . . . <data:AssignmentOption>Replace Only </data:AssignmentOption> . . . </data:WorkflowAssignBookAction> </data:WorkflowAction>	<AssignmentOption> specifies the type of book assignment. The valid values are as follows: ■ **Add.** This option assigns the target book to all records. ■ **Replace.** This option assigns the target book to all records and removes any previously assigned books that have the same type as the target book. ■ **Replace All.** This option assigns the target book to all records and removes all previously assigned books, regardless of type. ■ **Replace Only.** This option specifies that a currently assigned book is to be replaced by the target book. If the <AssignmentOption> element value is Replace Only, then the <ReplaceBookName> element or the <ReplaceBookExpr> element specifies the book that is to be replaced. ■ **Remove.** This option removes the existing assignment to the target book from all records. ■ **Remove All.** This option removes all assigned books from the records.

Table 59. Elements and Sections in the Assign a Book Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:WorkflowAssignBookAction> . . . <data:ReplaceBookName>NewBook </data:ReplaceBookName> <data:ReplaceBookExpr/> . . . </data:WorkflowAssignBookAction> </data:WorkflowAction>	If the <AssignmentOption> element value is Replace Only, then either the <ReplaceBookName> element or the <ReplaceBookExpr> element is required, to specify the book that is to be replaced. The elements are as follows: ■ <ReplaceBookName> optionally contains the name of the book that is to be replaced. ■ <ReplaceBookExpr> optionally contains an expression that evaluates to the name of the book that is to be replaced. **NOTE:** If the <ReplaceBookName> and <ReplaceBookExpr> elements both contain a value in an input file for an Upsert or InsertOrUpdate command, then only the value of the <ReplaceBookName> element is saved in Oracle CRM On Demand.
<data:WorkflowAction> . . . <data:WorkflowAssignBookAction> . . . <data:ApplyTo>Both</data:ApplyTo> </data:WorkflowAssignBookAction> </data:WorkflowAction>	<ApplyTo> specifies the cases in which the new book assignment will be made. The <ApplyTo> element is required if the <AssignmentOption> element value is anything other than Add. The valid values are as follows: ■ **Manual**. The book assignment will be made only in cases where the previous book assignment was made manually. ■ **Auto**. The book assignment will be made only in cases where the previous book assignment was made through workflow or a batch assignment. ■ **Both**. The new book assignment will be made in all cases.

Send Email Workflow Action Set

Table 60 describes the elements and sections in the Send Email workflow action set XML output file.

Table 60. Elements and Sections in the Send Email Workflow Action Set XML File

Element or Section	Description
<data:WorkflowName>Opportunity Approval </data:WorkflowName>	<WorkflowName> 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 Send Email Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . </data:WorkflowAction>	The <WorkflowAction> section contains the details of the workflow action.
<data:WorkflowAction> <data:Name>SendEmailTest</data:Name> . . . </data:WorkflowAction>	<Name> is the name of the workflow action.
<data:WorkflowAction> . . . <data:Active>true</data:Active> . . . </data:WorkflowAction>	<Active> specifies whether the workflow action is active (true) or inactive (false).
<data:WorkflowAction> . . . <data:Order>2</data:Order> . . . </data:WorkflowAction>	<Order> 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.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	The <WorkflowSendEmailAction> section contains the details of the Send Email workflow action.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:FromType>FROM_EMAIL_ADDRESS </data:FromType> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	<FromType> corresponds to the From field in the user interface (UI). It indicates the source of the From email address. The valid values are: ■ **FROM_EMAIL_ADDRESS**. This value corresponds to the Current User option in the UI. ■ **FROM_DEFAULT.** This value corresponds to the Default Email Address option in the UI. ■ **SPECIFIC_EMAIL_ADDRESS.** This value corresponds to the Specific Email Address option in the UI.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:From></data:From> . . . </data:WorkflowSendEmailAction> . . . </data:WorkflowAction>	<From> contains the From email address when <FromType> is set to SPECIFIC_EMAIL_ADDRESS.

Table 60. Elements and Sections in the Send Email Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:ReplyToType>CURRENT_USER_ADDRESS </data:ReplyToType> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	<ReplyToType> corresponds to the Reply To field in the user interface (UI). It indicates the source of the email address that automatically appears in the To field when an email recipient replies to the email. The valid values are: ■ **CURRENT_USER_ADDRESS**. This value corresponds to the Current User option in the UI. ■ **SPECIFIC_EMAIL_ADDRESS.** This value corresponds to the Specific Email Address option in the UI. If this field is left empty, then the From address in the email appears in the To field in the email response.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:ReplyTo></data:ReplyTo> . . . </data:WorkflowSendEmailAction> . . . </data:WorkflowAction>	<ReplyTo> contains the email reply address when <ReplyToType> is set to SPECIFIC_EMAIL_ADDRESS.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:ToType>R</data:ToType> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	<ToType> corresponds to the To field in the UI. It indicates the type of the To email address. The valid values are: ■ **R.** Corresponds to the Relative User on Record option in the UI. ■ **U.** Corresponds to the Specific User option in the UI. ■ **E.** Corresponds to the Specific Email Address option in the UI.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:To>O_Primary Owner Id</data:To> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	<To> specifies the recipient for the email. The value of this element depends on the value in the <ToType> element, as follows: ■ If <ToType> is set to U (Specific User), then the <To> element contains the User ID of the user. ■ If <ToType> is set to R (Relative User on Record), then the value of the <To> element is defined, see Table 62 on page 233. ■ If <ToType> is set to E (Specific Email Address), then the <To> element contains the expression defined for specific email addresses.

Table 60. Elements and Sections in the Send Email Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:Subject>New Opportunity</data:Subject> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	<Subject> contains the subject line for the email.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:EmailFormat>HTML</data:EmailFormat> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	<EmailFormat> specifies the format for the email message, which can be Plain Text or HTML.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:MessageBody>A new high potential opportunity has been created.</data:MessageBody> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	<MessageBody> contains the content of the email message. For information about the HTML elements that are supported for use in workflow email messages, see *Oracle CRM On Demand Online Help*. **NOTE:** When updating or inserting a workflow action with an email message in HTML format, the left angle bracket (<) at the start of each HTML tag must be encoded as <. At the end of the HTML tag, the right angle bracket (>) can be used, or it can be encoded as >. 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.
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:ListOfWorkflowEmailTranslations> . . . </data:ListOfWorkflowEmailTranslations> . . . </data:WorkflowSendEmailAction> </data:WorkflowAction>	The <ListOfWorkflowEmailTranslations> section contains the translation values for the email subject and message.

Table 60. Elements and Sections in the Send Email Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:WorkflowSendEmailAction> . . . <data:ListOfWorkflowEmailTranslations> <data:WorkflowEmailTranslation> <data:LanguageCode>ENU </data:LanguageCode> <data:SubjectTranslation> New Opportunity </data:SubjectTranslation> <data:MessageBodyTranslation> A new high potential opportunity has been created. </data:MessageBodyTranslation> </data:WorkflowEmailTranslation> . . . </data:ListOfWorkflowEmailTranslations> </data:WorkflowSendEmailAction> </data:WorkflowAction>	The <WorkflowEmailTranslation> section contains the translation values for the email subject and message, for one language: ■ <LanguageCode> contains the three-letter language code for a language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <SubjectTranslation> contains the email subject line in the language identified by the language code. ■ <MessageBodyTranslation> contains the email message body text in the language identified by the language code.

Create Task Workflow Action Set

Table 61 describes the elements and sections in the Create Task workflow action set XML output file.

Table 61. Elements and Sections in the Create Task Workflow Action Set XML File

Element or Section	Description
<data:WorkflowName>Opportunity Approval </data:WorkflowName>	<WorkflowName> 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.
<data:WorkflowAction> . . . </data:WorkflowAction>	The <WorkflowAction> section contains the details of the workflow action.
<data:WorkflowAction> <data:Name>CreateTaskTest</data:Name> . . . </data:WorkflowAction>	<Name> is the name of the workflow action.
<data:WorkflowAction> . . . <data:Active>false</data:Active> . . . </data:WorkflowAction>	<Active> specifies whether the workflow action is active (true) or is inactive (false).

Table 61. Elements and Sections in the Create Task Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:Order>3</data:Order> . . . </data:WorkflowAction>	<Order> 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.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	The <WorkflowCreateTaskAction> section contains the details of the Create Task workflow action.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> <data:Owner>O_Primary Owner Id</data:Owner> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<Owner> specifies the owner for the task. The <Owner> element's value depends on the <OwnerType> element, as follows: ■ If <OwnerType> is set to U (Specific User), then the <Owner> element contains the name of the user. ■ If the <OwnerType> element is set to R (Relative User On Record), then the value of the <Owner> element is defined, see Table 62.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:OwnerType>R</data:OwnerType> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<OwnerType> corresponds to the Owner field in the user interface. The valid values are: ■ **R.** Corresponds to the Relative User On Record option in the user interface. ■ **U.** Corresponds to the Specific User option in the user interface.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:Type>Approval</data:Type> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<Type> is the activity type.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:SubType>Callback</data:SubType> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<SubType> is the activity subtype.

Table 61. Elements and Sections in the Create Task Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:DueDate>Today()+2</data:DueDate> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<DueDate> contains an expression that evaluates to the due date for the task.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:Priority>2-Medium</data:Priority> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<Priority> specifies the priority of the task.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:Status>Not Started</data:Status> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<Status> specifies the status of the task.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:TaskCurrency>CAD</data:TaskCurrency> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<TaskCurrency> contains the three-character currency code for the task.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:Private>false</data:Private> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<Private> specifies whether the task is visible only to the task user (true), or is visible to users other than the task user (false).
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . </data:Subject> . . . </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<Subject> contains the subject line for the task.
<data:WorkflowAction> . . . <data:WorkflowCreateTaskAction> . . . <data:Description></data:Description> </data:WorkflowCreateTaskAction> </data:WorkflowAction>	<Description> contains the description of the task.

System Names and Display Names for Owner and To Element Values for Relative User on Record

Table 62 on page 233 shows the system names and corresponding display names for the values that can appear in the following elements:

- The <Owner> element in the Create Task workflow action set XML file, when the <OwnerType> element is set to R (Relative User on Record).
- The <To> element in the Send Email workflow action set XML file, when the <ToType> element is set to R (Relative User on Record).

NOTE: The T_Team Role values are available for the Account, Contact, Lead, Opportunity, and Service Request record types only.

Table 62. System Names and Display Names for the Owner and To Element Values for Relative User On Record

System Name in the XML File	Display Name
C_	Service Request Created By
MA_Account Id	Account Owner's Manager
M_Owned By Id	*Object* Owner's Manager
M_Owner Id	Lead Owner's Manager
M_Primary HH Owner Id	Household Owner's Manager
M_Primary Owner Id	*Object* 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	*Object* Owner
O_Sales Rep Id	Salesperson
T_Team Role_Consultant	*Object* Team - Consultant
T_Team Role_Executive Sponsor	*Object* Team - Executive Sponsor
T_Team Role_Other	*Object* Team - Other
T_Team Role_Owner	*Object* Team - Owner
T_Team Role_Partner	*Object* Team - Partner

NOTE: For the Account, Contact, Lead, Opportunity, and Service Request record types, any custom roles that are added to the record type can be used in the Relative User on Record element, in

addition to the values shown in Table 62. The system name for a custom team role is in the format T_Team Role_*teamrolename*, where *teamrolename* is the name given to the team role.

Wait Action Workflow Action Set

Table 63 describes the elements and sections in the Wait workflow action set XML output file.

Table 63. Elements and Sections in the Wait Workflow Action Set XML File

Element or Section	Description
<data:WorkflowName>Opportunity Approval</data:WorkflowName>	<WorkflowName> 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.
<data:WorkflowAction> . . . </data:WorkflowAction>	The <WorkflowAction> section contains the details of the workflow action.
<data:WorkflowAction> <data:Name>WaitTest</data:Name> . . . </data:WorkflowAction>	<Name> is the name of the workflow action.
<data:WorkflowAction> . . . <data:Active>true</data:Active> . . . </data:WorkflowAction>	<Active> specifies whether the workflow action is active (true) or inactive (false).
<data:WorkflowAction> . . . <data:Order>4</data:Order> . . . </data:WorkflowAction>	<Order> 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.
<data:WorkflowAction> . . . <data:WorkflowWaitAction> . . . </data:WorkflowWaitAction> </data:WorkflowAction>	The <WorkflowWaitAction> section contains the details of the Wait workflow action.
<data:WorkflowAction> . . . <data:WorkflowWaitAction> <data:ReevaluateRuleConditionsAfterWait>true </data:ReevaluateRuleConditionsAfterWait> . . . </data:WorkflowWaitAction> </data:WorkflowAction>	<ReevaluateRuleConditionsAfterWait> determines whether the workflow rule condition is to be reevaluated when the waiting period ends (true) or the workflow rule condition is not to be reevaluated (false).

Table 63. Elements and Sections in the Wait Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:WorkflowWaitAction> . . . <data:WaitType>Period</data:WaitType> . . . </data:WorkflowWaitAction> </data:WorkflowAction>	<WaitType> specifies the type of wait period selected in the user interface. The values that are valid are: ■ Period ■ Period Expression ■ Date Time ■ Date Time Expression
<data:WorkflowAction> . . . <data:WorkflowWaitAction> . . . <data:DateTime></data:DateTime> . . . </data:WorkflowWaitAction> </data:WorkflowAction>	<DateTime> specifies the date and time the wait period will end, if the <WaitType> value is Date Time.
<data:WorkflowAction> . . . <data:WorkflowWaitAction> . . . <data:WaitExpression>PYM10DTHM </data:WaitExpression> </data:WorkflowWaitAction> </data:WorkflowAction>	<WaitExpression> contains an expression that specifies the wait period, if the <WaitType> value is Period Expression or Date Time Expression. If the <WaitType> value is Period, then <WaitExpression> indicates the period as PYMDTHM. For example: ■ PYM10DTHM indicates 10 days. ■ P1Y3MDTHM indicates 1 year and 3 months. ■ PYMDT5H15M indicates 5 hours and 15 minutes.

Field Update Workflow Action Set

Table 64 describes the elements and sections in the Field Update workflow action set XML output file.

Table 64. Elements and Sections in the Field Update Workflow Action Set XML File

Element or Section	Description
<data:WorkflowName>Opportunity Approval </data:WorkflowName>	<WorkflowName> 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 64. Elements and Sections in the Field Update Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . </data:WorkflowAction>	The <WorkflowAction> section contains the details of the workflow action.
<data:WorkflowAction> <data:Name>UpdateFieldTest</data:Name> . . . </data:WorkflowAction>	<Name> is the name of the workflow action.
<data:WorkflowAction> . . . <data:Active>true</data:Active> . . . </data:WorkflowAction>	<Active> specifies whether the workflow action is active (true) or inactive (false).
<data:WorkflowAction> . . . <data:Order>5</data:Order> . . . </data:WorkflowAction>	<Order> 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. **NOTE:** A Field Update Workflow action must be preceded by at least one Wait action.
<data:WorkflowAction> . . . <data:WorkflowFieldUpdateAction> . . . </data:WorkflowFieldUpdateAction> </data:WorkflowAction>	The <WorkflowFieldUpdateAction> section contains the details of the Update Values workflow action.
<data:WorkflowAction> . . . <data:WorkflowFieldUpdateAction> <data:FieldName>Total Asset Value</data:FieldName> . . . </data:WorkflowFieldUpdateAction> </data:WorkflowAction>	<FieldName> is the system name of the field.
<data:WorkflowAction> . . . <data:WorkflowFieldUpdateAction> . . . <data:Value>10000</data:Value> . . . </data:WorkflowFieldUpdateAction> </data:WorkflowAction>	<Value> is the new value for the field.
<data:WorkflowAction> . . . <data:WorkflowFieldUpdateAction> . . . <data:OverwriteExistingValues>true </data:OverwriteExistingValues> </data:WorkflowFieldUpdateAction> </data:WorkflowAction>	<OverwriteExistingValues> specifies whether the existing value in the field (if the field has an existing value) is to be overwritten with the new value (true) or is not to be overwritten (false). If the field is empty, the field is updated with the new value, even if <OverwriteExistingValues> is set to false.

Create Integration Event Workflow Action Set

Table 65 describes the elements and sections in the Create Integration Event workflow action set XML output file.

Table 65. Elements and Sections in the Create Integration Event Workflow Action Set XML File

Element or Section	Description
<data:WorkflowName>Opportunity Approval</data:WorkflowName>	<WorkflowName> 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.
<data:WorkflowAction> . . . </data:WorkflowAction>	The <WorkflowAction> section contains the details of the workflow action.
<data:WorkflowAction> <data:Name>EventQueue</data:Name> . . . </data:WorkflowAction>	<Name> is the name of the workflow action.
<data:WorkflowAction> . . . <data:Active>true</data:Active> . . . </data:WorkflowAction>	<Active> specifies whether the workflow action is active (true) or inactive (false).
<data:WorkflowAction> . . . <data:Order>6</data:Order> . . . </data:WorkflowAction>	<Order> 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.
<data:WorkflowAction> . . . <data:WorkflowCreateIntegrationEventAction> . . . </data:WorkflowCreateIntegrationEventAction> </data:WorkflowAction>	The <WorkflowCreateIntegrationEvent> section contains the details of the Create Integration Event workflow action.
<data:WorkflowAction> . . . <data:WorkflowCreateIntegrationEventAction> <data:ListOfQueues> <data:QueueName>Default Queue</data:QueueName> . . . </data:ListOfQueues> . . . </data:WorkflowCreateIntegrationEventAction> </data:WorkflowAction>	The <ListOfQueues> section specifies the queues to which the integration events are to be written. <QueueName> contains the name of a queue.

Table 65. Elements and Sections in the Create Integration Event Workflow Action Set XML File

Element or Section	Description
<data:WorkflowAction> . . . <data:WorkflowCreateIntegrationEventAction> . . . <data:ListOfFields> . . . </data:ListOfFields> </data:WorkflowCreateIntegrationEventAction> </data:WorkflowAction>	The <ListOfFields> section specifies the fields that are tracked by the Create Integration Event workflow action.
<data:WorkflowAction> . . . <data:WorkflowCreateIntegrationEventAction> . . . <data:ListOfFields> <data:FieldName>Currency Code</data:FieldName> . . . </data:ListOfFields> . . . </data:WorkflowCreateIntegrationEventAction> </data:WorkflowAction>	<FieldName> contains the system name of the field.
<data:WorkflowAction> . . . <data:WorkflowCreateIntegrationEventAction> . . . <data:ListOfFields> <data:AlwaysInclude>true</data:AlwaysInclude> . . . </data:ListOfFields> </data:WorkflowCreateIntegrationEventAction> </data:WorkflowAction>	<AlwaysInclude> specifies whether the field is included in the integration event, even if the value of the field has not been changed (true) or if the field is included in the integration event only when the value of the field is changed (false).
<data:WorkflowAction> . . . <data:WorkflowCreateIntegrationEventAction> . . . <data:ListOfFields> . . . <data:TrackChanges>true</data:TrackChanges> </data:ListOfFields> </data:WorkflowCreateIntegrationEventAction> </data:WorkflowAction>	<TrackChanges> specifies whether an integration event is generated each time the field is updated (true). The workflow action creates an integration event only if <TrackChanges> is set to true for at least one field, and if a change is detected in at least one of the fields for which <TrackChanges> is set to true.
<data:WorkflowAction> . . . <data:WorkflowCreateIntegrationEventAction> . . . <data:SchemaVersion>Web Services v2.0 </data:SchemaVersion> </data:WorkflowCreateIntegrationEventAction> </data:WorkflowAction>	<SchemaVersion> specifies the Web service schema version that is to be used for the integration events. Web Services v2.0 is the default value.

Submit Call Workflow Action Set

Table 66 describes the elements and sections in the Submit Call workflow action set XML output file.

NOTE: The Submit Call workflow action is available only in Oracle CRM On Demand Life Sciences Edition.

Table 66. Elements and Sections in the Submit Call Workflow Action Set XML File

Element or Section	Description
`<data:WorkflowName>Activity Insert</data:WorkflowName>`	<WorkflowName> 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.

`<data:WorkflowAction>`
`. . .`
`</data:WorkflowAction>`
	The <WorkflowAction> section contains the details of the workflow action.

`<data:WorkflowAction>`
`  <data:Name>Auto Call Submit</data:Name>`
`. . .`
`</data:WorkflowAction>`
	<Name> is the name of the workflow action.

`<data:WorkflowAction>`
`. . .`
`  <data:Active>true</data:Active>`
`. . .`
`</data:WorkflowAction>`
	<Active> specifies whether the workflow action is active (true) or inactive (false).

`<data:WorkflowAction>`
`. . .`
`  <data:Order>1</data:Order>`
`. . .`
`</data:WorkflowAction>`
	<Order> 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.

`<data:WorkflowAction>`
`. . .`
`  <data:WorkflowSubmitCallAction/>`
`</data:WorkflowAction>`
	The <WorkflowSubmitCallAction> section contains no data. For more information about the Submit Call action and how you can use it, see *Oracle CRM On Demand Disconnected Mobile Sales Administration Guide*, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network (OTN).

Submit Workflow Action Set

Table 67 describes the elements and sections in the Submit workflow action set XML output file.

NOTE: The Submit workflow action is available only in Oracle CRM On Demand Life Sciences Edition.

Table 67. Elements and Sections in the Submit Workflow Action Set XML File

Element or Section	Description
<data:WorkflowName>MyTestSubmitTrans</data:WorkflowName>	<WorkflowName> 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.
<data:WorkflowAction> . . . </data:WorkflowAction>	The <WorkflowAction> section contains the details of the workflow action.
<data:WorkflowAction> <data:Name>AutoTransSubmit</data:Name> . . . </data:WorkflowAction>	<Name> is the name of the workflow action.
<data:WorkflowAction> . . . <data:Active>true</data:Active> . . . </data:WorkflowAction>	<Active> specifies whether the workflow action is active (true) or inactive (false).
<data:WorkflowAction> . . . <data:Order>1</data:Order> . . . </data:WorkflowAction>	<Order> 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.
<data:WorkflowAction> . . . <data:WorkflowSubmitTransactionAction/> </data:WorkflowAction>	The <WorkflowSubmitTransactionAction> section contains no data. For more information about using the Submit action for submitting sample transactions, see *Oracle CRM On Demand Online Help*.

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 241
- "Extracting All Workflow Rule Sets" on page 242
- "Updating or Inserting Workflow Rules (Upsert)" on page 243
- "Updating or Inserting Workflow Rules (InsertOrUpdate)" on page 244

- "Deleting a Workflow Rule Set" on page 245

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 55 on page 215.
- *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:

```
migrationtool -u UserID -s ServerURL Read WorkflowRuleSet "" "" "" MyWorkflowRule
```

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:

```
migrationtool -u UserID -s ServerURL Read WorkflowRuleSet Account PreWriteRecord
```

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:

  *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 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:

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

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:

```
migrationtool -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 214.

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):

```
migrationtool -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.
- *WorkfowRulesXML* 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:

```
migrationtool -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):

```
migrationtool -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.
- *WorkfowRulesXML* 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 55 on page 215.
- *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:

```
migrationtool -u UserID -s ServerURL Delete WorkflowRuleSet Account PreWriteRecord
```

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 246

- "Extracting Workflow Action Sets That Are Related to a Workflow Rule Set" on page 247
- "Updating or Inserting a Workflow Action Set (Upsert)" on page 248
- "Updating or Inserting Workflow Actions (InsertOrUpdate)" on page 249

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:

```
/WorkflowActionSet/WorkflowRuleName.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:

```
migrationtool -u UserID -s ServerURL Read WorkflowActionSet WorkflowRuleName
[WorkflowActionName] [ActiveFlag]
```

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 55 on page 215.
- *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):

```
migrationtool -u UserID -s ServerURL Upsert 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 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:

```
migrationtool -u UserID -s ServerURL Upsert WorkflowActionSet "C:\My Files\My
WorkflowActionSet.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.

23 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 253
- Assignment Rule Groups on page 253
- Assignment Rules on page 255
- Privileges Required for Migrating Assignment Rule Groups and Assignment Rules on page 256
- Elements and Sections in the Assignment Rule Groups Output File on page 256
- Elements and Sections in the Assignment Rules Output File on page 260
- Migrating Assignment Rule Groups on page 265
- Migrating Assignment Rules on page 269

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 68 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 265.

Table 68. Oracle Migration Tool On Demand Commands for Assignment Rule Groups

Command	Description
`Read AssignmentRuleGroup [S`*`ystemNameOfObject`*`] [`*`RuleGroupName`*`]`	This command extracts all of the assignment rule groups for a specific record type (object), or a single assignment rule group (if the *RuleGroupName* parameter is specified). The parameters for the command are as follows: ■ *SystemNameOfObject* 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 471. 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 *SystemNameOfObect* parameter. An empty value is specified as a set of double quotation marks (""). ■ *RuleGroupName* is name of a specific rule group. You can extract an individual assignment rule group by specifying a value for the *RuleGroupName* parameter.
`ReadAll AssignmentRuleGroup`	This command extracts all assignment rule groups, for all record types.
`Upsert AssignmentRuleGroup` *`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 69 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 269.

Table 69. Oracle Migration Tool On Demand Commands for Assignment Rules

Command	Description
`Read AssignmentRule [`*`SystemNameOfObject`*`] [`*`RuleGroupName`*`] [`*`RuleName`*`]`	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: ■ *SystemNameOfObject* is the system name of the record type (object). The system names for the record types are listed in "System Names for Record Types" on page 471. 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 *SystemNameOfObect* parameter. An empty value is specified as a set of double quotation marks (""). ■ *RuleGroupName* 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 *RuleGroupName* parameter. ■ *RuleName* is the name of a rule. You can extract an individual assignment rule by specifying a value for the *RuleName* paratmeter.
`ReadAll AssignmentRule`	This command extracts all assignment rules in all assignment rule groups, for all record types.
`Upsert AssignmentRule` *`AssignmentRuleXML`*	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 70 describes the elements and sections in the assignment rule groups XML output file.

Table 70. Elements and Sections in the Assignment Rule Groups XML File

Element or Section	Description
<data:AssignmentRuleGroup> . . . </data:AssignmentRuleGroup>	The <AssignmentRuleGropup> section contains all of the information for a single assignment rule group.
<data:AssignmentRuleGroup> . . . <data:RecordType>Service Request </data:RecordType> . . . </data:AssignmentRuleGroup>	<RecordType> contains the system name of the record type (object), which never changes.
<data:AssignmentRuleGroup> . . . <data:RuleGroupName>SRTestGroup </data:RuleGroupName> . . . </data:AssignmentRuleGroup>	<RuleGroupName> contains the name of the assignment rule group.
<data:AssignmentRuleGroup> . . . <data:Active>false</data:Active> . . . </data:AssignmentRuleGroup>	<Active> specifies whether this assignment rule group is active (true) or inactive (false).
<data:AssignmentRuleGroup> . . . <data:UnassignedOwner>EXAPMLECOMPANY/TESTUSER </data:UnassignedOwner> . . . </data:AssignmentRuleGroup>	<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 70. Elements and Sections in the Assignment Rule Groups XML File

Element or Section	Description
<data:AssignmentRuleGroup> . . . <data:UnassignedTerritory/> . . . </data:AssignmentRuleGroup>	<UnassignedTerritory> is the territory that inherits the records that are not assigned by one of the rules. The <UnassignedTerritory> 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.
<data:AssignmentRuleGroup> . . . <data:ReturnEmail>test.sender@example.com </data:ReturnEmail/> . . . </data:AssignmentRuleGroup>	<ReturnEmail> 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. The <ReturnEmail> 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. **NOTE:** You can optionally turn off the email notification for individual assignment rules for the Service Request record type, by setting the <EmailNotification> element on the rule to false. You cannot turn off the email notification for assignment rules for the Lead record type.
<data:AssignmentRuleGroup> . . . <data:ListOfRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	The <ListOfRule> section contains details of the rules for the rule group.
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> . . . </data:AssignmentRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	The <AssignmentRule> section contains all of the top-level details for one rule in the rule group. **NOTE:** The team assignment and criteria information for a rule is not contained in the assignment rule group XML file. The team assignment and criteria informaiton for a rule is contained in the assignment rule XML file only.

Table 70. Elements and Sections in the Assignment Rule Groups XML File

Element or Section	Description
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> <data:RuleName>SRRule1</data:RuleName> . . . </data:AssignmentRule> . . . </data:ListOfRule> </data:AssignmentRuleGroup>	<RuleName> contains the name of the rule.
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> . . . <data:Order>1</data:Order> . . . </data:AssignmentRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	<Order> 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.
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> . . . <data:AssignTo>EXAMPLECOMPANY/TESTUSER2 </data:AssignTo> . . . </data:AssignmentRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	<AssignTo> 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.
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> . . . <data:EmailNotification>true </data:EmailNotification> . . . </data:AssignmentRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	The <EmailNotification> 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. The <EmailNotification> 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. **NOTE:** 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 <EmailNotification> element is set to true.

Table 70. Elements and Sections in the Assignment Rule Groups XML File

Element or Section	Description
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> . . . <data:AssignToTerritory/> . . . </data:AssignmentRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	<AssignToTerritory> is the territory to which the record is assigned if the criteria on the rule are met. The <AssignToTerritory> 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.
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> . . . <data:IncludeTeamAssignment>false </data:IncludeTeamAssignment> . . . </data:AssignmentRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	<IncludeTeamAssignment> specifies whether the team members are assigned to the record (true), or the team members are not assigned to the record (false). The <IncludeTeamAssignment> 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.
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> . . . <data:IncludeRelatedContacts>false </data:IncludeRelatedContacts> . . . </data:AssignmentRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	<IncludeRelatedContacts> 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. The <IncludeRelatedContacts> 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.
<data:AssignmentRuleGroup> . . . <data:ListOfRule> <data:AssignmentRule> . . . <data:IncludeRelatedOpportunites>false </data:IncludeRelatedOpportunites> </data:AssignmentRule> . . . </data:ListOfRule> . . . </data:AssignmentRuleGroup>	<IncludeRelatedOpportunities> 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. The<IncludeRelatedOpportunities> 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.

Elements and Sections in the Assignment Rules Output File

Table 71 describes the elements and sections in the assignment rules XML output file.

Table 71. Elements and Sections in the Assignment Rules XML File

Element or Section	Description
<data:AssignmentRule> . . . </data:AssignmentRule>	The <AssignmentRule> section contains all of the details of one assignment rule.
<data:AssignmentRule> <data:RecordType>Account </data:RecordType> . . . </data:AssignmentRule>	<RecordType> contains the system name of the record type (object), which never changes.
<data:AssignmentRule> . . . <data:RuleGroupName>AcctTestGroup </data:RuleGroupName> . . . </data:AssignmentRule>	<RuleGroupName> contains the name of the assignment rule group to which this rule belongs.
<data:AssignmentRule> . . . <data:RuleName>AcctRule1 </data:RuleName> . . . </data:AssignmentRule>	<RuleName> contains the name of the rule.
<data:AssignmentRule> . . . <data:Order>1</data:Order> . . . </data:AssignmentRule>	<Order> 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.
<data:AssignmentRule> . . . <data:AssignTo>EXAMPLECOMPANY/TESTUSER2 </data:AssignTo> . . . </data:AssignmentRule>	<AssignTo> 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.

Table 71. Elements and Sections in the Assignment Rules XML File

Element or Section	Description
<data:AssignmentRule> . . . <data:SendEmailNotification>true </data:SendEmailNotification> . . . </data:AssignmentRule>	The <SendEmailNotification> 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. The <SendEmailNotification> 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. **NOTE:** 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 <EmailNotification> element is set to true
<data:AssignmentRule> . . . <data:AssignToTerritory/> . . . </data:AssignmentRule>	<AssignToTerritory> is the territory to which the record is assigned if the criteria on the rule are met. The <AssignToTerritory> 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.
<data:AssignmentRule> . . . <data:IncludeTeamAssignment>true </data:IncludeTeamAssignment> . . . </data:AssignmentRule>	<IncludeTeamAssignment> specifies whether the team members are assigned to the record (true), or the team members are not assigned to the record (false). 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.

Table 71. Elements and Sections in the Assignment Rules XML File

Element or Section	Description
<data:AssignmentRule> . . . <data:IncludeRelatedContacts>true </data:IncludeRelatedContacts> . . . </data:AssignmentRule>	<IncludeRelatedContacts> 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. The <IncludeRelatedContacts> 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.
<data:AssignmentRule> . . . <data:IncludeRelatedOpportunities>true </data:IncludeRelatedOpportunities> . . . </data:AssignmentRule>	<IncludeRelatedOpportunities> 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. The<IncludeRelatedOpportunities> 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.
<data:AssignmentRule> . . . <data:ListofTeam> . . . </data:ListofTeam> . . . </data:AssignmentRule>	The <ListofTeam> section contains details of the team members who share ownership of the assigned records. Team members can be added to assignment rules for the Account and Opportunity record types only. The <ListofTeam> section is ignored for upsert requests for assignment rules for other record types.
<data:AssignmentRule> . . . <data:ListofTeam> <data:Team> . . . </data:Team> . . . </data:ListofTeam> . . . </data:AssignmentRule>	The <Team> section contains details of one of the team members who share ownership of the assigned records.

Table 71. Elements and Sections in the Assignment Rules XML File

Element or Section	Description
<data:AssignmentRule> . . . <data:ListofTeam> <data:Team> <data:User>Test User</data:User> . . . </data:Team> . . . </data:ListofTeam> . . . </data:AssignmentRule>	<User> contains the first and last name of the user.
<data:AssignmentRule> . . . <data:ListofTeam> <data:Team> . . . <data:Role>TestRole</data:Role> . . . </data:Team> . . . </data:ListofTeam> . . . </data:AssignmentRule>	<Role> contains the role of the team member. This element is read-only and is ignored for upsert requests.
<data:AssignmentRule> . . . <data:ListofTeam> <data:Team> . . . <data:AccountAccess>Edit</data:AccountAccess> . . . </data:Team> . . . </data:ListofTeam> . . . </data:AssignmentRule>	<AccountAccess> 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 <AccountAccess> 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.
<data:AssignmentRule> . . . <data:ListofTeam> <data:Team> . . . <data:ContactAccess>Full</data:ContactAccess> . . . </data:Team> . . . </data:ListofTeam> . . . </data:AssignmentRule>	<ContactAccess> 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 <ContactAccess> element is applicable for assignment rules for the Account record type only, and is applicable only if the <IncludeRelatedContacts> element is set to true for the rule. This element is ignored for upsert requests for assignment rules for other record types.

Table 71. Elements and Sections in the Assignment Rules XML File

Element or Section	Description
<data:AssignmentRule> . . . <data:ListofTeam> <data:Team> . . . <data:OpportunityAccess>ReadOnly </data:OpportunityAccess> </data:Team> . . . </data:ListofTeam> . . . </data:AssignmentRule>	<OpportunityAccess> 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 <IncludeRelatedOpportunities> element is set to true for the rule, then the <OpportunityAccess> 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.
<data:AssignmentRule> . . . <data:ListOfRuleCriteria> . . . </data:ListOfRuleCriteria> </data:AssignmentRule>	The <ListofRuleCriteria> section contain details of the criteria for the assignment rule. You can specify multiple criteria for one rule.
<data:AssignmentRule> . . . <data:ListOfRuleCriteria> </data:Rule> . . . </data:Rule> . . . </data:ListOfRuleCriteria> </data:AssignmentRule>	The <Rule> section contains the details of one rule criterion.
<data:AssignmentRule> . . . <data:ListOfRuleCriteria> </data:Rule> <data:Field>Account Type</data:Field> . . . </data:Rule> . . . </data:ListOfRuleCriteria> </data:AssignmentRule>	<Field> contains the name of the field that is to be evaluated.
<data:AssignmentRule> . . . <data:ListOfRuleCriteria> </data:Rule> . . . <data:Condition>Contains all values </data:Condition> . . . </data:Rule> . . . </data:ListOfRuleCriteria> </data:AssignmentRule>	<Condition> specifies the condition that must be satisfied to meet the criterion.

Table 71. Elements and Sections in the Assignment Rules XML File

Element or Section	Description
<data:AssignmentRule> . . . <data:ListOfRuleCriteria> </data:Rule> . . . <data:Value>Competitor</data:Value> . . . </data:Rule> . . . </data:ListOfRuleCriteria> </data:AssignmentRule>	<Value> contains the value for the criterion.
<data:AssignmentRule> . . . <data:ListOfRuleCriteria> </data:Rule> . . . <data:Sequence>1000</data:Sequence> </data:Rule> . . . </data:ListOfRuleCriteria> </data:AssignmentRule>	<Sequence> specifies the sequence of the criterion on the rule. This field is read-only and is ignored for upsert requests.

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 265
- "Extracting All Assignment Rule Groups for a Single Object" on page 266
- "Extracting All Assignment Rule Groups" on page 267
- "Updating or Inserting an Assignment Rule Group" on page 267

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 471. 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 ("").

  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:

```
migrationtool -u UserID -s ServerURL Read AssignmentRuleGroup Account "My Account
Assignment Rule 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:

```
migrationtool -u UserID -s ServerURL Read AssignmentRuleGroup 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 471.

  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:

```
migrationtool -u UserID -s ServerURL Read AssignmentRuleGroup 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:

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

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 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 269
- "Extracting All Assignment Rules for a Single Rule Group" on page 270
- "Extracting All Assignment Rules for a Single Object" on page 271
- "Extracting All Assignment Rules" on page 272
- "Updating or Inserting an Assignment Rule" on page 272

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 471. 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 ("").

  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:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule Account "My Assignment Rule Group" MyAssignmentRule
```

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:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule [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 rules apply, for example, Account. The system names for the record types are listed in "System Names for Record Types" on page 471. 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:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule Account "My Assignment Rule 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:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule 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 471.

  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:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule 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:

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

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):

```
migrationtool -u UserID -s ServerURL Upsert AssignmentRule AssignmentRuleXML
```

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.

24 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 275
- Privileges Required for Migrating List Access and Order Layouts on page 276
- Elements and Sections in the List Access and Order Layout XML Output File on page 276
- Migrating List Access and Order Layouts on page 277

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 72 describes the Oracle Migration Tool On Demand client commands used with list access and order layouts. These commands are case sensitive.

Table 72. Commands Used with List Access and Order Layouts in Oracle Migration Tool On Demand

Command	Description
`Read ListAccessAndOrder` *`SystemNameOfObject RoleName`*	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: ■ *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471. ■ *RoleName* 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. **NOTE:** You can determine the system names of the roles by extracting the roles, as described in "Extracting All Roles" on page 199.
`ReadAll ListAccessAndOrder`	This command extracts the list access and order layouts for all record types, and for all roles.

Table 72. Commands Used with List Access and Order Layouts in Oracle Migration Tool On Demand

Command	Description
`Upsert ListAccessAndOrder` *`ListAccessAndOrderXML`*	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.
- For the `Upsert` command: Enable Web Services Access, Customize Application, Manage Public Lists, 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 73 describes the elements and sections in the list access and order layout XML output file.

Table 73. Elements and Sections in the List Access and Order Layout XML File

Element or Section	Description

`<data:ListAccessAndOrder>`
`. . .`
`</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>`
`  <data:ObjectName>Account`
`  </data:ObjectName>`
`. . .`
`</data:ListAccessAndOrder>`
	<ObjectName> contains the system name of the record type (object), which never changes.

`<data:ListAccessAndOrder>`
`. . .`
`  <data:RoleName>TestRole`
`  </data:RoleName>`
`. . .`
`</data:ListAccessAndOrder>`
	<RoleName> contains the language-independent name of the role.

Table 73. Elements and Sections in the List Access and Order Layout XML File

Element or Section	Description
<data:ListAccessAndOrder> . . . <data:ModifiedBy>AB User 10/26/2012 10:12:40</data:ModifiedBy> . . . </data:ListAccessAndOrder>	<ModifiedBy> contains the username of the user who last updated the layout, and the date and time the layout was last updated.
<data:ListAccessAndOrder> . . . <data:ListOfListAccessAndOrderList> . . . </data:ListOfListAccessAndOrderList> </data:ListAccessAndOrder>	The <ListOfListAccessAndOrderList> section contains details of the list layout for one record type, for one role.
<data:ListAccessAndOrder> . . . <data:ListOfListAccessAndOrderList> <data:ListAccessAndOrderList> <data:ListName>My Active Accounts</data:ListName> <data:Order>2</data:Order> . . . </data:ListAccessAndOrderList> . . . </data:ListOfListAccessAndOrderList> . . . </data:ListAccessAndOrder>	The <ListAccessAndOrderList> section contains details of one list, for one record type, for one role. It includes the following elements: ■ <ListName> contains the name of the list ■ <Order> indicates the order of the list within the layout, as follows: ■ A value of 2 or higher indicates that the list is 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. ■ A value of -1 indicates that the list is in the Lists Available for this Role section. ■ A value of -2 indicates that the list is in the All Lists section.

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 278
- "Extracting List Access and Order Layouts for All Objects and Roles" on page 278
- "Updating or Inserting List Access and Order Layouts (Upsert)" on page 279

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 471.
- *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:

```
migrationtool -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 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:

```
migrationtool -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.

25 Migrating Role Associations for Analytics Folders

This chapter describes how to migrate the associations between roles and analytics folders using the Oracle Migration Tool On Demand client. It contains the following topics:

- Role Associations for Analytics Folders on page 281
- Privileges Required for Migrating Role Associations for Analytics Folders on page 282
- Elements and Sections in the Role Associations for Analytics XML Output File on page 283
- Migrating Role Associations for Analytics Folders on page 285

Role Associations for Analytics Folders

Users can store the analyses and dashboards that they create in folders. Folders can be created in a user's personal area in Oracle CRM On Demand and in the company wide shared folders in Oracle CRM On Demand, including the Company Wide Shared Folder and the Migrated Company Wide Shared Folder. The Company Wide Shared Folder contains a predefined Dashboards folder, under which users can create subfolders for storing dashboards.

Analyses and dashboards that are stored in a user's personal area are available only to that user. Analyses that are saved in the Company Wide Shared Folder and the Migrated Company Wide Shared Folder are available to all users by default, and dashboards that are stored in folders under the predefined Dashboards folder are available to all users by default.

However, you can limit access to the contents of subfolders in the company wide shared folders, including the subfolders in the predefined Dashboards folder, by associating roles with the subfolders. After you associate one or more roles with a folder, only users with those roles can access that 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 analytics folders, see *Oracle CRM On Demand Online Help*.

NOTE: You cannot associate roles with the Dashboards subfolder under the Company Wide Shared Folder, but you can associate roles with the subfolders under the Dashboards folder.

You can use the Oracle Migration Tool On Demand client to extract and update the associations between roles and existing folders in the company wide shared folders. However, you cannot use the Oracle Migration Tool On Demand client to create analytics folders or subfolders.

Table 74 describes the Oracle Migration Tool On Demand client commands used with role associations for analytics folders. These commands are case sensitive.

Table 74. Commands Used with Role Associations for Analytics Folders in Oracle Migration Tool On Demand

Command	Description

`Read ReportFolder` *`FolderPath`*	This command extracts the details of a specified folder and its role associations. The *FolderPath* parameter must specify the full path for the folder, including the string for the root folder. For the folders in the Company Wide Shared Folder, the root folder is:
	`/shared/Company Analyses`
	For the folders in the Migrated Company Wide Shared Folder, the root folder is:
	`/shared/Migrated Company Analyses`
	The extracted information includes the name of the folder's parent folder and the names of any subfolders.

`ReadAll ReportFolder`	This command extracts the details of all analytics folders and their role associations.
`Upsert ReportFolder` *`ReportFolderXML`*	This command updates or inserts role associations for an analytics folder. **NOTE:** You can use the `Upsert` command only to add role associations for existing folders, and to set the access level for the roles. You cannot use the `Upsert` command to remove role associations from folders or to create new folders or subfolders.

Privileges Required for Migrating Role Associations for Analytics Folders

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 Roles and Access, Manage Custom Reports (to extract role associations for folders containing analyses), and Manage Dashboards (to extract role associations for folders under the predefined Dashboards folder). In addition, to extract role associations for the folders in the Migrated Company Wide Shared Folder, the Access Migrated Company Wide Shared Folder privilege is required.

- For the Upsert command: Enable Web Services Access, Manage Roles and Access, Manage Custom Reports (to update or insert role associations for folders containing analyses), and Manage Dashboards (to update or insert role associations for folders under the predefined Dashboards folder). In addition, to update or insert role associations for the folders in the Migrated Company Wide Shared Folder, the Access Migrated Company Wide Shared Folder privilege is required.

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

Elements and Sections in the Role Associations for Analytics XML Output File

Table 75 describes the elements and sections in the role associations for analytics folders XML output file.

Table 75. Elements and Sections in the Role Associations for Analytics Folders XML File

Element or Section	Description
<data:ReportFolder> . . . </data:ReportFolder>	The <ReportFolder> section contains all of the information for a single folder and its subfolders.
<data:ReportFolder> <data:Catalog>V3</data:Catalog> . . . </data:ReportFolder>	<Catalog> contains the catalog version for the folder. The valid value is V3. **NOTE:** When you insert or update the role associations for a folder, you must either set the <Catalog> element to V3 or leave it empty. If you leave the element empty, then V3 is used by default.
<data:ReportFolder> . . . <data:Path>/shared/Company Analyses/ Test Folder</data:Path> . . . </data:ReportFolder>	<Path> contains the path for the folder.
<data:ReportFolder> . . . <data:FolderName>Test Folder </data:FolderName> . . . </data:ReportFolder>	<FolderName> contains the name of the folder.

Table 75. Elements and Sections in the Role Associations for Analytics Folders XML File

Element or Section	Description
<data:ReportFolder> . . . <data:Description>This is my test folder</data:Description> . . . </data:ReportFolder>	<Description> contains the description of the folder, if a description exists.
<data:ReportFolder> . . . <data:ParentFolder>Company Analyses</data:ParentFolder> . . . </data:ReportFolder>	<ParentFolder> 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.
<data:ReportFolder> . . . <data:ListOfSubFolders> . . . </data:ListOfSubFolders> . . . </data:ReportFolder>	The <ListOfSubFolders> section contains details of the subfolders under the current folder, if any exist.
<data:ReportFolder> . . . <data:ListOfSubFolders> <data:SubFolder> <data:Catalog>V3</data:Catalog> <data:Path>/shared/Company Analyses/ Test Folder/Test Folder A</data:Path> <data:FolderName>Test Folder A</data:FolderName> <data:Description/> </data:SubFolder> . . . </data:ListOfSubFolders> . . . </data:ReportFolder>	The <SubFolder> section contains details of one subfolder. It includes the following elements: ■ <Catalog> contains the catalog version for the subfolder. ■ <Path> contains the path to the subfolder. ■ <FolderName> contains the name of the subfolder. ■ <Description> contains a description of the subfolder.
<data:ReportFolder> . . . <data:ListOfAssociatedRoles> . . . </data:ListOfAssociatedRoles> </data:ReportFolder>	The <ListOfAssociatedRoles> section contains details of the role associations for the folder.

Table 75. Elements and Sections in the Role Associations for Analytics Folders XML File

Element or Section	Description
<data:ReportFolder> . . . <data:ListOfAssociatedRoles> <data:AssociatedRole> <data:RoleName>User Role2 </data:RoleName> <data:AccessLevel>Change/Delete </data:AccessLevel> </data:AssociatedRole> . . . </data:ListOfAssociatedRoles> </data:ReportFolder>	The <AssociatedRole> section contains details of a single role association, including the following: ■ <RoleName> is the name of the role. ■ <AccessLevel> is the level of access that is given to this role for this folder.

Migrating Role Associations for Analytics Folders

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate role associations for analytics folders:

- "Extracting Role Associations for a Single Analytics Folder" on page 285
- "Extracting Role Associations for All Analytics Folders" on page 286
- "Updating or Inserting Role Associations for Analytics Folders" on page 286

Extracting Role Associations for a Single Analytics Folder

This topic describes how to extract the role associations for a single analytics 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 analytics 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 Analytics Folder

The following is an example of extracting the role associations for a single analytics folder. In this example, the folder named Test Folder A is a subfolder of the folder named Test Folder:

```
migrationtool -u UserID -s ServerURL Read ReportFolder "/shared/Company Analyses/
Test Folder/Test Folder A"
```

NOTE: Quotation marks are always required for the folder path, because the path for the root folder (/shared/Company Analyses or /shared/Migrated Company Analyses) contains a space.

Extracting Role Associations for All Analytics Folders

This topic describes how to extract the role associations for all analytics 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 analytics folders:

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

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 Role Associations for Analytics Folders

This topic describes how to insert or update role associations for an analytics folder on your Oracle CRM On Demand environment (customer test environment or production).

About the Upsert Operation

The Upsert command inserts or updates role associations for analytics folders based on the following user keys:

- <Path>
- <Path> and <Catalog>

  NOTE: The <Catalog> element must either be set to V3 or left empty. If you leave the <Catalog> element empty, then V3 is used by default.

Oracle CRM On Demand attempts to locate the folder specified in the input file based on the user key. If an existing folder that matches the value in the <Path> element is located, then the following happens:

- If a role association that is specified in the input file already exists for that folder, and if the access level that is specified for the role in the input file is different from the existing access level for the role, then the role association is updated. Otherwise, the existing role association is left unchanged.
- If a role association that is specified in the input file does not already exist for the folder, then the role association is inserted for the folder.
- Any existing role associations for the folder that are not specified in the input file are left unchanged.

Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update role associations for an analytics folder:

```
migrationtool -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 XML file containing the role associations for the analytics folder, 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:

  ```
  migrationtool -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 Role Associations for an Analytics Folder

The following is an example of updating or inserting role associations for an analytics folder in your Oracle CRM On Demand server:

```
migrationtool -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.

26 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 289
- Privileges Required for Migrating Custom HTML Head Tag Additions on page 289
- Elements in the Custom HTML Head Tag Additions XML Output File on page 290
- Migrating Custom HTML Head Tag Additions on page 290

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 76 describes the Oracle Migration Tool On Demand client commands used with custom HTML head tag additions. These commands are case sensitive.

Table 76. Commands Used with Custom HTML Head Tag Additions in Oracle Migration Tool On Demand

Command	Description
`ReadForValue CustomHTMLHeadTag`	This command exports the custom HTML head tag additions for the Oracle CRM On Demand pages.
`Upsert CustomHTMLHeadTag` *`CustomHTMLHeadTagXML`*	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 77 describes the elements in the custom HTML head tag additions XML output file.

Table 77. Elements in the Custom HTML Head Tag Additions XML File

Element	Description
<data:HTMLHeadAdditions></data:HTMLHeadAdditions>	<HTMLHeadAdditions> 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 290
- "Updating or Inserting Custom HTML Head Tag Additions" on page 291

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:

```
migrationtool -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:

```
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:

  ```
  migrationtool -u UserID -s ServerURL Upsert CustomHTMLHeadTag "C:\My Files\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.

27 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 293
- Privileges Required for Migrating Field Audit Setup Information on page 294
- Elements and Sections in the Field Audit Setup XML Output File on page 294
- Migrating Field Audit Setup Information on page 295

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 78 describes the Oracle Migration Tool On Demand client commands used with field audit setup. These commands are case sensitive.

Table 78. Commands Used with Field Audit Setup in Oracle Migration Tool On Demand

Command	Description
`Read FieldAuditSetUp` *`SystemNameOfObject`*	This command extracts the field audit setup information for a specific record type (object). *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471.
`ReadAll FieldAuditSetUp`	This command extracts the field audit setup information for all objects.
`Upsert FieldAuditSetUp` *`FieldAuditSetUpXML`*	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 79 describes the elements and sections in the field audit setup XML output file.

Table 79. Elements and Sections in the Field Audit Setup XML File

Element or Section	Description
<data:ObjectName>Account</data:ObjectName>	<ObjectName> contains the system name of the record type (object), which never changes.
<data:AuditRecordCreation>true </data:AuditRecordCreation>	<AuditRecordCreation> specifies whether the creation of records of this record type is tracked (true) or is not tracked (false).
<data:AuditRecordDeletionOrRestore>true </data:AuditRecordDeletionOrRestore>	<AuditRecordDeletionOrRestore> specifies whether the deletion and restoration of records of this record type are tracked (true) or are not tracked (false).
<data:ListOfFields> . . . </data:ListOfFields>	The <ListOfFields> section contains details of the fields that can be audited for the record type.
<data:ListOfFields> <data:Field> <data:Name>Furigana Name</data:Name> <data:IsAudited>true</data:IsAudited> </data:Field> . . . </data:ListOfFields>	The <Field> section contains the details for one field. It contains the following elements: ■ <Name> contains the system name of the field, which never changes. ■ <IsAudited> specifies whether changes to the field are tracked (true) or are not tracked (false).

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 295
- "Extracting Field Audit Setup Information for All Objects" on page 296
- "Updating Field Audit Setup Information (Upsert)" on page 296

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:

```
migrationtool -u UserID -s ServerURL Read FieldAuditSetUp 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 471.

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:

```
migrationtool -u UserID -s ServerURL Read FieldAuditSetUp 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:

```
migrationtool -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:

```
migrationtool -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:\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.

28 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 299
- Privileges Required for Migrating Sales Categories on page 299
- Elements and Sections in the Sales Categories XML Output File on page 300
- Migrating Sales Categories on page 301

Sales Categories

Sales categories are used to organize sales stages from different sales processes into groups. You can run analyses against the sales categories.

Table 80 describes the Oracle Migration Tool On Demand client commands used with sales categories. These commands are case sensitive.

Table 80. Commands Used with Sales Categories in Oracle Migration Tool On Demand

Command	Description
`Read SalesCategory` *`Order`*	This command extracts a sales category. The *Order* parameter specifies the order number of the sales category.
`ReadAll SalesCategory`	This command extracts all sales categories.
`Upsert SaleCategory` *`SalesCategoryXML`*	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 81 describes the elements and sections in the sales categories XML output file.

Table 81. Elements and Sections in the Sales Categories XML File

Element or Section	Description
<data:SalesCategory> <data:StageCategory>[Test Sales Category] </data:StageCategory> <data:Description>This is a test sales category </data:Description> <data:Order>1</data:Order> <data:MarkForTranslation>false </data:MarkForTranslation> . . . </data:SalesCategory>	<SalesCategory> contains the details of the sales category, as follows: ■ <StageCategory> is the name of the sales category. ■ <Description> is a description of the sales category. ■ <Order> is the order number of the sales category. ■ <MarkForTranslation> corresponds to the Mark for Translation check box in the UI. For more information, see "Considerations for the Mark for Translation Setting" on page 39.
<data:SalesCategory> . . . <data:ListOfSalesCategoryTranslations> . . . </data:ListOfSalesCategoryTranslations> </data:SalesCategory>	The <ListofSalesCategoryTranslations> section contains the translation values for the sales category.

Table 81. Elements and Sections in the Sales Categories XML File

Element or Section	Description
<data:SalesCategory> . . . <data:ListOfSalesCategoryTranslations> <data:SalesCategoryTranslation> <data:LanguageCode>ENU</data:LanguageCode> <data:StageCategory>My Test Sales Category 2 </data:StageCategory> <data:Description></data:Description> </data:SalesCategoryTranslation> . . . </data:ListOfSalesCategoryTranslations> </data:SalesCategory>	The <SalesCategoryTranslation> section contains the translation values for one language: ■ <LanguageCode> contains the three-letter language code for the language. For the list of language codes, see "Language Codes and Their Corresponding Language and Country" on page 339. ■ <StageCategory> contains the sales category name in the language identified by the language code. ■ <Description> contains the description in the language identified by the language code.

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 301
■ "Extracting All Sales Categories" on page 302
■ "Updating or Inserting Sales Categories (Upsert)" on page 302

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:

```
migrationtool -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:

```
migrationtool -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:

```
migrationtool -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):

```
migrationtool -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:

  ```
  migrationtool -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.

29 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 305
- Privileges Required for Migrating Modification Tracking Settings on page 306
- Elements and Sections in the Modification Tracking Settings XML Output File on page 306
- Migrating Modification Tracking Settings on page 306

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 Acccount, 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 82 describes the Oracle Migration Tool On Demand client commands used with modification tracking settings. These commands are case sensitive.

Table 82. Commands Used with Modification Tracking Settings in Oracle Migration Tool On Demand

Command	Description
Read EnableModificationTracking *SystemNameOfObject*	This command extracts the modification tracking setting for a specific record type (object). *SystemNameOfObject* is the system name of the record type. The system names for the record types are listed in "System Names for Record Types" on page 471. **NOTE:** The system name of the Picklist object is Picklist.
ReadAll EnableModificationTracking	This command extracts the modification tracking settings for all objects.
Upsert EnableModificationTracking *EnableModificationTrackingXML*	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 83 describes the elements and sections in the modification tracking settings XML output file.

Table 83. Elements and Sections in the Modification Tracking Settings XML File

Element or Section	Description
<data:ListOfEnableModificationTracking> <data:EnableModificationTracking> <data:Object>Account</data:Object> <data:Enabled>true</data:Enabled> </data:EnableModificationTracking> . . . </data:ListOfEnableModificationTracking>	The <EnableModificationTracking> section contains the details of the modification tracking setting for one record type (object). It includes the following elements: ■ <Object> contains the system name of the record type (object), which never changes. ■ <Enabled> 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).

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 307
- "Extracting Modification Tracking Settings for All Objects" on page 307

■ "Updating Modification Tracking Settings (Upsert)" on page 308

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 471.

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:\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 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\EnableModificationTracking\Account.xml"
```

NOTE: Quotation marks are required only if the fully qualified path name contains spaces.

30 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 311
- Privileges Required for Migrating Process Administration Configuration Data on page 312
- Elements and Sections in the Process Administration XML Output File on page 313
- Migrating Process Administration Configuration Data on page 317

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 84 describes the Oracle Migration Tool On Demand client commands used with process administration. These commands are case sensitive.

Table 84. Commands Used with Process Administration in Oracle Migration Tool On Demand

Command	Description
`Read ProcessAdministration` *`SystemNameOfObject`* [*`ProcessName`*]	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: ■ *SystemNameOfObject* 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 *SystemNameOfObject* 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 471. ■ *ProcessName* is the name of a process. This parameter is optional if you specify a record type in the command.
`ReadAll ProcessAdministration`	This command extracts the process administration configuration data for all record types.
`Upsert ProcessAdministration` *`ProcessXML`*	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 85 describes the elements and sections in the process administration XML output file.

Table 85. Elements and Sections in the Process Administration XML File

Element or Section	Description
<data:Process> . . . </data:Process>	The <Process> section contains all of the information for one process.
<data:Process> <data:RecordType>Activity </data:RecordType> . . . </data:Process>	<RecordType> contains the system name of the record type (object), which never changes.
<data:Process> . . . <data:ProcessName>Activity Process </data:ProcessName> . . . </data:Process>	<ProcessName> contains the name given to the process.
<data:Process> . . . <data:PrimaryField>Category </data:PrimaryField> . . . </data:Process>	<PrimaryField> 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. Only the Activity record type supports the use of a primary field to restrict the process.
<data:Process> . . . <data:TransitionField>Status </data:TransitionField> . . . </data:Process>	<TransitionField> contains the name of the field in the record type that determines the transition of records from one transition state to another. The Status field must be used as the transition field for all supported record types.
<data:Process> . . . <data:Description>This is a test process. </data:Description> . . . </data:Process>	<Description> contains the description of the process.

Table 85. Elements and Sections in the Process Administration XML File

Element or Section	Description
<data:Process> . . . <data:Order>1</data:Order> . . . </data:Process>	<Order> 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. **NOTE:** 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.
<data:Process> . . . <data:Default>true</data:Default> . . . </data:Process>	<Default> 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.
<data:Process> . . . <data:ListOfPrimaryValues> <data:PrimaryValues> <data:Value>Account Call </data:Value> </PrimaryValues> <data:PrimaryValues> <data:Value>Attendee Call </data:Value> </data:PrimaryValues> . . . </data:ListOfPrimaryValues> . . . </data:Process>	The <ListOfPrimaryValues> 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 <ListOfPrimaryValues> section.
<data:Process> . . . <data:ListOfTransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	The <ListOfTransitionStates> section contains the details of the transition states for the process.
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	The <TransitionStates> section contains the details of one transition state for the process.

Table 85. Elements and Sections in the Process Administration XML File

Element or Section	Description
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> <data:State>Deferred </data:State> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<State> 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. For upsert operations, the value in the <State> element must match an existing picklist value in the Status field for the record type.
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . <data:Category>Software </data:Category> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<Category> contains the name of the sales category that the transition state is associated with.
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . <data:Description>Test </data:Description> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<Description> contains a description of the transition state.
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . <data:Created>AB User 10/26/ 2012 10:12:40 </data:Created> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<Created> contains the username of the user who created the transition state, and the date and time the transition state was created.

Table 85. Elements and Sections in the Process Administration XML File

Element or Section	Description
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . <data:Modified>AB User 11/23/2016 11:27:40 </data:Modified> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<Modified> contains the username of the user who last updated the transition state, and the date and time the transition state was last updated.
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . <data:Condition> [{Priority}]="3-Low" </data:Condition> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<Condition> contains a condition that determines whether a record can move to this transition state. **NOTE:** Do not use any calculated fields in the expression. Calculated fields are not supported in expressions in the Condition field on transition states.
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . <data:ErrorMessage> </data:ErrorMessage> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<ErrorMessage> 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.

Table 85. Elements and Sections in the Process Administration XML File

Element or Section	Description
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . <data:DisableUpdate> </data:DisableUpdate> . . . </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<DisableUpdate> 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.
<data:Process> . . . <data:ListOfTransitionStates> <data:TransitionStates> . . . <data:DisableDeleteOrRemove> </data:DisableDeleteOrRemove> </data:TransitionStates> . . . </data:ListOfTransitionStates> </data:Process>	<DisableDeleteOrRemove> 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.

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 317
- "Extracting Processes for All Objects" on page 318
- "Updating or Inserting a Process (Upsert)" on page 319

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 471. 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:

```
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 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 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.

31 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 321
- Replicating Selective Configuration Data from a Source Environment to a Target Environment on page 329

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:

   ```
   migrationtool -u UserID -s TargetServer ReadAll AccessProfile

   migrationtool -u UserID -s TargetServer ReadAll ActionBarCustomWebApplet

   migrationtool -u UserID -s TargetServer ReadAll ActionBarLayout

   migrationtool -u UserID -s TargetServer ReadAll AssignmentRule
   ```

```
migrationtool -u UserID -s TargetServer ReadAll AssignmentRuleGroup
migrationtool -u UserID -s TargetServer ReadAll CascadingPicklist
migrationtool -u UserID -s TargetServer ReadAll ConcatenatedField
migrationtool -u UserID -s TargetServer ReadForValue CustomHTMLHeadTag
migrationtool -u UserID -s TargetServer ReadAll CustomRecordType
migrationtool -u UserID -s TargetServer ReadAll CustomWebLink
migrationtool -u UserID -s TargetServer ReadAll CustomWebTab
migrationtool -u UserID -s TargetServer ReadAll DetailPageCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll DynamicLayout
migrationtool -u UserID -s TargetServer ReadAll EnableModificationTracking
migrationtool -u UserID -s TargetServer ReadAll FieldAuditSetUp
migrationtool -u UserID -s TargetServer ReadAll FieldManagement
migrationtool -u UserID -s TargetServer ReadAll HomePageCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll HomepageLayout
migrationtool -u UserID -s TargetServer ReadAll HomeTabCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll IntegrationEventQueue
migrationtool -u UserID -s TargetServer ReadAll ListAccessAndOrder
migrationtool -u UserID -s TargetServer ReadAll PageLayoutField
migrationtool -u UserID -s TargetServer ReadAll PageLayoutRelatedInformation
migrationtool -u UserID -s TargetServer ReadAll PageLayoutSection
migrationtool -u UserID -s TargetServer ReadAll Picklist
migrationtool -u UserID -s TargetServer ReadAll PicklistValueGroup
migrationtool -u UserID -s TargetServer ReadAll ProcessAdministration
migrationtool -u UserID -s TargetServer ReadAll RelatedInformationLayout
migrationtool -u UserID -s TargetServer ReadAll ReportFolder
migrationtool -u UserID -s TargetServer ReadAll Role
migrationtool -u UserID -s TargetServer ReadAll SalesAssessmentTemplate
migrationtool -u UserID -s TargetServer ReadAll SalesCategory
migrationtool -u UserID -s TargetServer ReadAll SearchLayout
```

```
migrationtool -u UserID -s TargetServer ReadAll WorkflowRuleSet
```

where:

- *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:

```
migrationtool -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 246.

3 Retrieve all configuration data from the source environment by running the following commands:

```
migrationtool -u UserID -s SourceServer ReadAll AccessProfile

migrationtool -u UserID -s SourceServer ReadAll ActionBarCustomWebApplet

migrationtool -u UserID -s SourceServer ReadAll ActionBarLayout

migrationtool -u UserID -s SourceServer ReadAll AssignmentRule

migrationtool -u UserID -s SourceServer ReadAll AssignmentRuleGroup

migrationtool -u UserID -s SourceServer ReadAll CascadingPicklist

migrationtool -u UserID -s SourceServer ReadAll ConcatenatedField

migrationtool -u UserID -s SourceServer ReadForValue CustomHTMLHeadTag

migrationtool -u UserID -s SourceServer ReadAll CustomRecordType

migrationtool -u UserID -s SourceServer ReadAll CustomWebLink

migrationtool -u UserID -s SourceServer ReadAll CustomWebTab

migrationtool -u UserID -s SourceServer ReadAll DetailPageCustomWebApplet

migrationtool -u UserID -s SourceServer ReadAll DynamicLayout

migrationtool -u UserID -s SourceServer ReadAll EnableModificationTracking

migrationtool -u UserID -s SourceServer ReadAll FieldAuditSetUp

migrationtool -u UserID -s SourceServer ReadAll FieldManagement

migrationtool -u UserID -s SourceServer ReadAll HomePageCustomWebApplet

migrationtool -u UserID -s SourceServer ReadAll HomepageLayout

migrationtool -u UserID -s SourceServer ReadAll HomeTabCustomWebApplet
```

```
migrationtool -u UserID -s SourceServer ReadAll IntegrationEventQueue
migrationtool -u UserID -s SourceServer ReadAll ListAccessAndOrder
migrationtool -u UserID -s SourceServer ReadAll PageLayoutField
migrationtool -u UserID -s SourceServer ReadAll PageLayoutRelatedInformation
migrationtool -u UserID -s SourceServer ReadAll PageLayoutSection
migrationtool -u UserID -s SourceServer ReadAll Picklist
migrationtool -u UserID -s SourceServer ReadAll PicklistValueGroup
migrationtool -u UserID -s SourceServer ReadAll ProcessAdministration
migrationtool -u UserID -s SourceServer ReadAll RelatedInformationLayout
migrationtool -u UserID -s SourceServer ReadAll ReportFolder
migrationtool -u UserID -s SourceServer ReadAll Role
migrationtool -u UserID -s SourceServer ReadAll SalesAssessmentTemplate
migrationtool -u UserID -s SourceServer ReadAll SalesCategory
migrationtool -u UserID -s SourceServer ReadAll SearchLayout
migrationtool -u UserID -s SourceServer ReadAll WorkflowRuleSet
```

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:

```
migrationtool -u UserID -s SourceServer ReadForRuleSet WorkflowActionSet
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:

```
migrationtool -u UserID -s TargetServer Upsert CustomRecordType
CustomizedRecordTypeXML
migrationtool -u UserID -s TargetServer Upsert CustomWebTab CustomWebTabXML
migrationtool -u UserID -s TargetServer Upsert FieldManagement FieldManagementXML
migrationtool -u UserID -s TargetServer Upsert Picklist PicklistXML
```

```
migrationtool -u UserID -s TargetServer Upsert CascadingPicklist
CascadingPicklistXML

migrationtool -u UserID -s TargetServer Upsert PicklistValueGroup
PicklistValueGroupXML

migrationtool -u UserID -s TargetServer Upsert CustomWebLink CustomWebLinkXML

migrationtool -u UserID -s TargetServer Upsert ConcatenatedField
ConcatenatedFieldXML

migrationtool -u UserID -s TargetServer Upsert ActionBarCustomWebApplet
ActionBarCustomWebAppletXML

migrationtool -u UserID -s TargetServer Upsert DetailPageCustomWebApplet
DetailPageCustomWebAppletXML

migrationtool -u UserID -s TargetServer Upsert HomepageCustomWebApplet
HomepageCustomWebAppletXML

migrationtool -u UserID -s TargetServer Upsert HomeTabCustomWebApplet
HomeTabCustomWebAppletXML

migrationtool -u UserID -s TargetServer Upsert SalesAssessmentTemplate
SalesAssessmentScriptXML

migrationtool -u UserID -s TargetServer Upsert HomepageLayout HomepageLayoutXML

migrationtool -u UserID -s TargetServer Upsert ActionBarLayout ActionBarLayoutXML

migrationtool -u UserID -s TargetServer Upsert RelatedInformationLayout
RelatedInfoLayoutXML

migrationtool -u UserID -s TargetServer Upsert AccessProfile AccessProfileXML

migrationtool -u UserID -s TargetServer Upsert PageLayoutField PageLayoutFieldXML

migrationtool -u UserID -s TargetServer Upsert PageLayoutRelatedInformation
PageLayoutRelatedXML

migrationtool -u UserID -s TargetServer Upsert PageLayoutSection
PageLayoutSectionXML

migrationtool -u UserID -s TargetServer Upsert DynamicLayout DynamicLayoutXML

migrationtool -u UserID -s TargetServer Upsert SearchLayout SearchLayoutXML

migrationtool -u UserID -s TargetServer Upsert Role RoleXML

migrationtool -u UserID -s TargetServer Upsert IntegrationEventQueue
IntegrationEventQueueXML

migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowRules
WorkflowRulesXML

migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowActionSet
WorkflowActionSetXML
```

```
migrationtool -u UserID -s TargetServer Upsert AssignmentRuleGroup
AssignmentRuleGroupXML

migrationtool -u UserID -s TargetServer Upsert AssignmentRule AssignmentRuleXML

migrationtool -u UserID -s TargetServer Upsert ListAccessAndOrder
ListAccessAndOrderXML

migrationtool -u UserID -s TargetServer Upsert ReportFolder ReportFolderXML

migrationtool -u UserID -s TargetServer Upsert CustomHTMLHeadTag
CustomHTMLHeadTagXML

migrationtool -u UserID -s TargetServer Upsert FieldAuditSetUp
FieldAuditSetUpXML

migrationtool -u UserID -s TargetServer Upsert SalesCategory SalesCategoryXML

migrationtool -u UserID -s TargetServer Upsert EnableModificationTracking
EnableModificationTrackingXML

migrationtool -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`
- *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 CustomWwebTab.xml`
- *DetailPageCustomWebAppletXML* is the fully qualified path name of the detail page customized Web applet XML file, for example, `C:\My Files\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:\My Files\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:\My Files\MyHomePageCustomWebApplet.xml`
- *HomepageLayoutXML* is the fully qualified path name of the homepage layout XML file, for example, `C:\My Files\My HomepageLayout.xml`
- *HomeTabCustomWebAppletXML* is the fully qualified path name of the Home tab customized Web applet XML file, for example, `C:\My Files\MyHomeTabCustomWebApplet.xml`
- *IntegrationEventQueueXML* is the fully qualified path name of the integration event queue XML file, for example, `C:\My Files\MyIntegrationEventQueue.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:\My Files\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:\My Files\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:\My Files\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:\My Files\MyPicklistValueGroup.xml`
- *ProcessXML* is the fully qualified path name of the process administration XML file, for example, `C:\My Files\Account.xml`
- *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 containing the role associations for an analytics 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 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:

   `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.
- **HomeTabCustomWebApplet.** For Oracle CRM On Demand Home tab Web applet configuration data.
- **IntegrationEventQueue.** For Oracle CRM On Demand integration event queue 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 adminstration configuration data.
- **RelatedInformationLayout.** For Oracle CRM On Demand related information configuration data.
- **ReportFolder.** For Oracle CRM On Demand role associations for analytics 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:

```
migrationtool -u UserID -s TargetServer ReadForValue CustomHTMLHeadTag
```

4 Retrieve the required configuration data from the source environment by running one of the following commands:

- `migrationtool -u UserID -s SourceServer ReadAll Type`
- `migrationtool -u UserID -s SourceServer Read Type MetadataFilename`

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.
- **IntegrationEventQueue.** For Oracle CRM On Demand integration event queue 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 analytics 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:

```
migrationtool -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:

```
migrationtool -u UserID -s TargetServer Upsert CustomRecordType
CustomizedRecordTypeXML

migrationtool -u UserID -s TargetServer Upsert CustomWebTab CustomWebTabXML

migrationtool -u UserID -s TargetServer Upsert FieldManagement FieldManagementXML

migrationtool -u UserID -s TargetServer Upsert Picklist PicklistXML

migrationtool -u UserID -s TargetServer Upsert CascadingPicklist
CascadingPicklistXML

migrationtool -u UserID -s TargetServer Upsert PicklistValueGroup
PicklistValueGroupXML

migrationtool -u UserID -s TargetServer Upsert CustomWebLink CustomWebLinkXML

migrationtool -u UserID -s TargetServer Upsert ConcatenatedField
ConcatenatedFieldXML

migrationtool -u UserID -s TargetServer Upsert ActionBarCustomWebApplet
ActionBarCustomWebAppletXML

migrationtool -u UserID -s TargetServer Upsert DetailPageCustomWebApplet
DetailPageCustomWebAppletXML

migrationtool -u UserID -s TargetServer Upsert HomepageCustomWebApplet
HomepageCustomWebAppletXML

migrationtool -u UserID -s TargetServer Upsert HomeTabCustomWebApplet
HomeTabCustomWebAppletXML

migrationtool -u UserID -s TargetServer Upsert SalesAssessmentTemplate
SalesAssessmentScriptXML

migrationtool -u UserID -s TargetServer Upsert HomepageLayout HomepageLayoutXML

migrationtool -u UserID -s TargetServer Upsert ActionBarLayout ActionBarLayoutXML

migrationtool -u UserID -s TargetServer Upsert RelatedInformationLayout
RelatedInfoLayoutXML

migrationtool -u UserID -s TargetServer Upsert AccessProfile AccessProfileXML

migrationtool -u UserID -s TargetServer Upsert PageLayoutField PageLayoutFieldXML

migrationtool -u UserID -s TargetServer Upsert PageLayoutRelatedInformation
PageLayoutRelatedXML
```

```
migrationtool -u UserID -s TargetServer Upsert PageLayoutSection
PageLayoutSectionXML

migrationtool -u UserID -s TargetServer Upsert DynamicLayout DynamicLayoutXML

migrationtool -u UserID -s TargetServer Upsert SearchLayout SearchLayoutXML

migrationtool -u UserID -s TargetServer Upsert Role RoleXML

migrationtool -u UserID -s TargetServer Upsert IntegrationEventQueue
IntegrationEventQueueXML

migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowRules
WorkflowRulesXML

migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowActionSet
WorkflowActionSetXML

migrationtool -u UserID -s TargetServer Upsert AssignmentRuleGroup
AssignmentRuleGroupXML

migrationtool -u UserID -s TargetServer Upsert AssignmentRule AssignmentRuleXML

migrationtool -u UserID -s TargetServer Upsert ListAccessAndOrder
ListAccessAndOrderXML

migrationtool -u UserID -s TargetServer Upsert ReportFolder ReportFolderXML

migrationtool -u UserID -s TargetServer Upsert CustomHTMLHeadTag
CustomHTMLHeadTagXML

migrationtool -u UserID -s TargetServer Upsert FieldAuditSetUp
FieldAuditSetUpXML

migrationtool -u UserID -s TargetServer Upsert SalesCategory SalesCategoryXML

migrationtool -u UserID -s TargetServer Upsert EnableModificationTracking
EnableModificationTrackingXML

migrationtool -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 CustomWwebTab.xml
- *DetailPageCustomWebAppletXML* is the fully qualified path name of the detail page customized Web applet XML file, for example, C:\My Files\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\My DynamicLayout.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:\My Files\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:\My Files\MyHomePageCustomWebApplet.xml
- *HomepageLayoutXML* is the fully qualified path name of the homepage layout XML file, for example, C:\My Files\My HomepageLayout.xml

- *HomeTabCustomWebAppletXML* is the fully qualified path name of the Home tab customized Web applet XML file, for example, `C:\My Files\MyHomeTabCustomWebApplet.xml`
- *IntegrationEventQueueXML* is the fully qualified path name of the integration event queue XML file, for example, `C:\Oracle Migration Tool On Demand\repository\IntegrationEventQueue\MyIntegrationEventQueue.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:\My Files\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:\My Files\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:\My Files\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:\My Files\MyPicklistValueGroup.xml`
- *ProcessXML* is the fully qualified path name of the process administration XML file, for example, `C:\My Files\Account.xml`
- *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 containing the role associations for an analytics 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 339

Language Codes and Their Corresponding Language and Country

Table 86 lists the three-letter language codes in Oracle CRM On Demand and their corresponding languages.

Table 86. 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 86. 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 341
- Access Levels and Corresponding Permission Codes in the XML File on page 445

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 87 on page 342, 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 87 on page 342, 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 87 on page 342, 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 87 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 87 lists the access object names and their corresponding display names.

Table 87. 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 87. 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 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Accreditation AccreditationProductCategory (Accreditation Id)	Accreditation	Accreditation Product Product Categories	Child
Accreditation AccreditationRelationship (Accreditation Id)	Accreditation	Related Accreditations	Child
Accreditation AccreditationRequest (Accreditation Id)	Accreditation	Accreditation Requests	1-M-PRIMARY
Accreditation AccreditationSolution (Accreditation Id)	Accreditation	Accreditation Solutions	Child
Accreditation Custom Object 1 (Accreditation Id)	Accreditation	Custom Objects 01	1-M-PRIMARY
Accreditation Custom Object 2 (Accreditation Id)	Accreditation	Custom Objects 02	1-M-PRIMARY
Accreditation Custom Object 3 (Accreditation Id)	Accreditation	Custom Objects 03	1-M-PRIMARY
Accreditation CustomObject10 (Accreditation Id)	Accreditation	Custom Objects 10	1-M-PRIMARY
Accreditation CustomObject11 (Accreditation Id)	Accreditation	Custom Objects 11	1-M-PRIMARY
Accreditation CustomObject12 (Accreditation Id)	Accreditation	Custom Objects 12	1-M-PRIMARY
Accreditation CustomObject13 (Accreditation Id)	Accreditation	Custom Objects 13	1-M-PRIMARY
Accreditation CustomObject14 (Accreditation Id)	Accreditation	Custom Objects 14	1-M-PRIMARY
Accreditation CustomObject15 (Accreditation Id)	Accreditation	Custom Objects 15	1-M-PRIMARY
Accreditation CustomObject4 (Accreditation Id)	Accreditation	Custom Objects 04	1-M-PRIMARY
Accreditation CustomObject5 (Accreditation Id)	Accreditation	Custom Objects 05	1-M-PRIMARY
Accreditation CustomObject6 (Accreditation Id)	Accreditation	Custom Objects 06	1-M-PRIMARY
Accreditation CustomObject7 (Accreditation Id)	Accreditation	Custom Objects 07	1-M-PRIMARY

Table 87. 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
Accreditation/Audit Trail Item 2	Accreditation	Audit Trail	ReadOnly
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Acct CustObj3	Account	Custom Objects 03	M-M-PRIMARY
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Activity CustomObject11 (Activity Id)	Activity	Custom Objects 11	1-M-PRIMARY
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Application Activity (Application Id)	Application	Activities	1-M-PRIMARY
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
Asset Mgmt - Asset/Audit Trail Item 2	Asset	Audit Trail	ReadOnly
Auto Vehicle/Audit Trail Item 2	Vehicle	Audit Trail	ReadOnly
Auto Vehicle/Auto Vehicle Book	Vehicle	Books	Child
BlockedProduct	Not applicable	Blocked Products	Top
BlockedProduct/Audit Trail Item 2	BlockedProduct	Audit Trail	ReadOnly
Book	Not applicable	Books	Top
Book Sub-Book	Book	Sub-Books	1-M
Book User	Book	Users	Child
BP Sales Assmt	CRMODLS_BusinessPlan	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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
BrokerProfile CustomObject11 (Broker Profile Id)	BrokerProfile	Custom Objects 11	1-M-PRIMARY
BrokerProfile CustomObject12 (Broker Profile Id)	BrokerProfile	Custom Objects 12	1-M-PRIMARY
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
BrokerProfile/Audit Trail Item 2	BrokerProfile	Audit Trail	ReadOnly
Bulk Data Load	Not applicable	Bulk Data Load	Top
Call ProdDetail	Not applicable	Products Detailed	Top
Call ProdDetail CallProdDetail_MsgPlanItem (Product Detailed Id)	Call ProdDetail	Call Product Detail Messaging Plan Items	1-M-PRIMARY
Call ProdDetail 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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CallProdDetail_MsgPlnRel	Not applicable	Call Product Detail Messaging Plan Item Relations	Top
CallProdDetail_MsgRsp	Not applicable	Call Product Detail Message Responses	Top
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Campaign CustomObject6 (Campaign Id)	Campaign	Custom Objects 06	1-M-PRIMARY
Campaign CustomObject7 (Campaign Id)	Campaign	Custom Objects 07	1-M-PRIMARY
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/Audit Trail Item 2	Campaign	Audit Trail	ReadOnly
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
Certification Custom Object 1 (Certfication Id)	Certification	Custom Objects 01	1-M-PRIMARY
Certification Custom Object 2 (Certfication Id)	Certification	Custom Objects 02	1-M-PRIMARY
Certification Custom Object 3 (Certfication Id)	Certification	Custom Objects 03	1-M-PRIMARY
Certification CustomObject10 (Certfication Id)	Certification	Custom Objects 10	1-M-PRIMARY
Certification CustomObject11 (Certfication Id)	Certification	Custom Objects 11	1-M-PRIMARY
Certification CustomObject12 (Certfication Id)	Certification	Custom Objects 12	1-M-PRIMARY
Certification CustomObject13 (Certfication Id)	Certification	Custom Objects 13	1-M-PRIMARY
Certification CustomObject14 (Certfication Id)	Certification	Custom Objects 14	1-M-PRIMARY
Certification CustomObject15 (Certfication Id)	Certification	Custom Objects 15	1-M-PRIMARY
Certification CustomObject4 (Certfication Id)	Certification	Custom Objects 04	1-M-PRIMARY
Certification CustomObject5 (Certfication Id)	Certification	Custom Objects 05	1-M-PRIMARY
Certification CustomObject6 (Certfication Id)	Certification	Custom Objects 06	1-M-PRIMARY
Certification CustomObject7 (Certfication Id)	Certification	Custom Objects 07	1-M-PRIMARY
Certification CustomObject8 (Certfication Id)	Certification	Custom Objects 08	1-M-PRIMARY
Certification CustomObject9 (Certfication Id)	Certification	Custom Objects 09	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Certification/Audit Trail Item 2	Certification	Audit Trail	ReadOnly
Certification/Certification Book	Certification	Books	Child
Certification/CertificationTeam	Certification	Certification Teams	Child
CertificationAttachment	Not applicable	Certification Attachments	Top
CertificationCourse	Not applicable	Certification Courses	Top
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
Channel Partner/Audit Trail Item 2	Dealer	Audit Trail	ReadOnly
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
Claim/Audit Trail Item 2	Claim	Audit Trail	ReadOnly
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
Contact CRMOD_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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
Course CustomObject8 (Course Id)	Course	Custom Objects 08	1-M-PRIMARY
Course CustomObject9 (Course Id)	Course	Custom Objects 09	1-M-PRIMARY
Course/Audit Trail Item 2	Course	Audit Trail	ReadOnly
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
Coverage/Audit Trail Item 2	Coverage	Audit Trail	ReadOnly
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_ContactLicenses/Audit Trail Item 2	CRMOD_LS_ContactLicenses	Audit Trail	ReadOnly
CRMOD_LS_MessagingPlan	Not applicable	Messaging Plans	Top
CRMOD_LS_MessagingPlan CRMOD_LS_MsgPlanItem (Parent Message Plan Id)	CRMOD_LS_MessagingPlan	Messaging Plan Items	1-M-PRIMARY
CRMOD_LS_MessagingPlan CRMODLS_BusinessPlan (Message Plan Id)	CRMOD_LS_MessagingPlan	Business Plans	1-M-PRIMARY
CRMOD_LS_MessagingPlan 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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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/Audit Trail Item 2	CRMOD_LS_MessagingPlan	Audit Trail	ReadOnly
CRMOD_LS_MessagingPlan/ CRMOD_LS_MessagingPlan Book	CRMOD_LS_MessagingPlan	Books	Child
CRMOD_LS_MsgPlanItem	Not applicable	Messaging Plan Items	Top
CRMOD_LS_MsgPlanItem CallProdDetail_MsgPlanItem (Messaging Plan Item Id)	CRMOD_LS_MsgPlanItem	Call Product Detail Messaging Plan Items	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CRMOD_LS_MsgPlnRel (Parent MP Item Id)	CRMOD_LS_MsgPlanItem	Messaging Plan Item Relations	1-M-PRIMARY
CRMOD_LS_MsgPlanItem 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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_MsgPlanItem CustomObject15 (Plan Item Id)	CRMOD_LS_Msg PlanItem	Custom Objects 15	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject4 (Plan Item Id)	CRMOD_LS_Msg PlanItem	Custom Objects 04	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject5 (Plan Item Id)	CRMOD_LS_Msg PlanItem	Custom Objects 05	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject6 (Plan Item Id)	CRMOD_LS_Msg PlanItem	Custom Objects 06	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject7 (Plan Item Id)	CRMOD_LS_Msg PlanItem	Custom Objects 07	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject8 (Plan Item Id)	CRMOD_LS_Msg PlanItem	Custom Objects 08	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject9 (Plan Item Id)	CRMOD_LS_Msg PlanItem	Custom Objects 09	1-M-PRIMARY
CRMOD_LS_MsgPlanItem/Audit Trail Item 2	CRMOD_LS_Msg PlanItem	Audit Trail	ReadOnly
CRMOD_LS_MsgPlnRel	Not applicable	Messaging Plan Item Relations	Top
CRMOD_LS_MsgPlnRel CallProdDetail_MsgPlnRel (Message Plan Item Rel Id)	CRMOD_LS_Msg PlnRel	Call Product Detail Messaging Plan Item Relations	1-M-PRIMARY
CRMOD_LS_MsgPlnRel Custom Object 1 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 01	1-M-PRIMARY
CRMOD_LS_MsgPlnRel Custom Object 2 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 02	1-M-PRIMARY
CRMOD_LS_MsgPlnRel Custom Object 3 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 03	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject10 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 10	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject11 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 11	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject12 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 12	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_MsgPlnRel CustomObject13 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 13	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject14 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 14	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject15 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 15	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject4 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 04	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject5 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 05	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject6 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 06	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject7 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 07	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject8 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 08	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject9 (Plan Item Relation Id)	CRMOD_LS_Msg PlnRel	Custom Objects 09	1-M-PRIMARY
CRMOD_LS_MsgPlnRel/Audit Trail Item 2	CRMOD_LS_Msg PlnRel	Audit Trail	ReadOnly
CRMOD_LS_TransactionItems	Not applicable	Transaction Items	Top
CRMOD_LS_Transactions	Not applicable	Sample Transactions	Top
CRMOD_LS_Transactions CRMOD_LS_TransactionItems (Sample Transaction Id)	CRMOD_LS_Tran sactions	Transaction Items	1-M-PRIMARY
CRMOD_LS_Transactions Custom Object 1 (Transaction Id)	CRMOD_LS_Tran sactions	Custom Objects 01	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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 CustomObject10 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 10	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject11 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 11	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject12 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 12	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject13 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 13	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject14 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 14	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject15 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 15	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject4 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 04	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject5 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 05	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject6 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 06	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject7 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 07	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject8 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 08	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject9 (Transaction Id)	CRMOD_LS_Transactions	Custom Objects 09	1-M-PRIMARY
CRMOD_LS_Transactions/Audit Trail Item 2	CRMOD_LS_Transactions	Audit Trail	ReadOnly
CRMOD_LS_Transactions/ CRMOD_LS_Transactions Book	CRMOD_LS_Transactions	Books	Child
CRMODLS_BPL_ACNT	Not applicable	Plan Accounts	Top
CRMODLS_BPL_ACNT/Audit Trail Item 2	CRMODLS_BPL_ACNT	Audit Trail	ReadOnly
CRMODLS_BPL_CNTCT	Not applicable	Plan Contacts	Top

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_BPL_CNTCT/Audit Trail Item 2	CRMODLS_BPL_CNTCT	Audit Trail	ReadOnly
CRMODLS_BusinessPlan	Not applicable	Business Plan	Top
CRMODLS_BusinessPlan AccreditationRequest (Plan Id)	CRMODLS_BusinessPlan	Accreditation Requests	1-M-PRIMARY
CRMODLS_BusinessPlan Activity (Business Plan Id)	CRMODLS_BusinessPlan	Activities	1-M-PRIMARY
CRMODLS_BusinessPlan CertificationRequest (Plan Id)	CRMODLS_BusinessPlan	Certification Requests	1-M-PRIMARY
CRMODLS_BusinessPlan Cmpltd Activity	CRMODLS_BusinessPlan	Activities	1-M-PRIMARY
CRMODLS_BusinessPlan CRMOD_LS_MessagingPlan (Business Plan Id)	CRMODLS_BusinessPlan	Messaging Plans	1-M
CRMODLS_BusinessPlan CRMODLS_BPL_ACNT (Business Plan Id)	CRMODLS_BusinessPlan	Plan Accounts	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_BPL_CNTCT (Business Plan Id)	CRMODLS_BusinessPlan	Plan Contacts	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_BusinessPlan (Parent Plan Name Id)	CRMODLS_BusinessPlan	Business Plans	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_BusinessPlan_ATTACHMENT (CRMODLS_BusinessPlan Id)	CRMODLS_BusinessPlan	Business Plan Attachments	Child
CRMODLS_BusinessPlan CRMODLS_OBJECTIVE (Plan Name Id)	CRMODLS_BusinessPlan	Objectives	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_PlanOpportunities (Plan Id)	CRMODLS_BusinessPlan	Plan Opportunities	1-M-PRIMARY
CRMODLS_BusinessPlan Custom Object 1 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 01	1-M-PRIMARY
CRMODLS_BusinessPlan Custom Object 2 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 02	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_BusinessPlan Custom Object 3 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 03	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject10 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 10	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject11 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 11	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject12 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 12	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject13 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 13	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject14 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 14	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject15 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 15	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject4 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 04	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject5 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 05	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject6 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 06	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject7 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 07	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject8 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 08	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject9 (Business Plan Id)	CRMODLS_BusinessPlan	Custom Objects 09	1-M-PRIMARY
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_BusinessPlan/ CRMODLS_BusinessPlanTeam	CRMODLS_BusinessPlan	Business Plan Teams	Child
CRMODLS_BusinessPlan_ATTACHMENT	Not applicable	Business Plan Attachments	Top
CRMODLS_InventoryAuditReport	Not applicable	Inventory Audit Reports	Top
CRMODLS_InventoryAuditReport CRMODLS_SampleInventory (Audit Report Id)	CRMODLS_InventoryAuditReport	Sample Inventory	Child
CRMODLS_InventoryAuditReport/ Audit Trail Item 2	CRMODLS_InventoryAuditReport	Audit Trail	ReadOnly
CRMODLS_InventoryAuditReport/ CRMODLS_InventoryAuditReport Book	CRMODLS_InventoryAuditReport	Books	Child
CRMODLS_InventoryPeriod	Not applicable	Inventory Periods	Top
CRMODLS_InventoryPeriod CRMOD_LS_Transactions (Inventory Period Id)	CRMODLS_InventoryPeriod	Sample Transactions	1-M
CRMODLS_InventoryPeriod CRMODLS_InventoryAuditReport (Inventory Period Id)	CRMODLS_InventoryPeriod	Inventory Audit Reports	1-M
CRMODLS_InventoryPeriod 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
CRMODLS_InventoryPeriod CustomObject10 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 10	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject11 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 11	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject12 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 12	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject13 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 13	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_InventoryPeriod CustomObject14 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 14	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject15 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 15	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject4 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 04	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject5 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 05	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject6 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 06	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject7 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 07	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject8 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 08	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject9 (Invt Period Id)	CRMODLS_InventoryPeriod	Custom Objects 09	1-M-PRIMARY
CRMODLS_InventoryPeriod/Audit Trail Item 2	CRMODLS_InventoryPeriod	Audit Trail	ReadOnly
CRMODLS_InventoryPeriod/ CRMODLS_InventoryPeriod Book	CRMODLS_InventoryPeriod	Books	Child
CRMODLS_ModificationLog	Not applicable	Modification Trackings	Top
CRMODLS_OBJECTIVE	Not applicable	Objective	Top
CRMODLS_OBJECTIVE Accreditation (Objective Id)	CRMODLS_OBJECTIVE	Accreditations	1-M
CRMODLS_OBJECTIVE AccreditationRequest (Objective Id)	CRMODLS_OBJECTIVE	Accreditation Requests	1-M-PRIMARY
CRMODLS_OBJECTIVE Activity (Objective Id)	CRMODLS_OBJECTIVE	Activities	1-M-PRIMARY
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
CRMODLS_OBJECTIVE CustomObject4 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 04	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject5 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 05	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject6 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 06	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_OBJECTIVE CustomObject7 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 07	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject8 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 08	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject9 (Objective Id)	CRMODLS_OBJECTIVE	Custom Objects 09	1-M-PRIMARY
CRMODLS_OBJECTIVE DealRegistration (Objective Id)	CRMODLS_OBJECTIVE	Deal Registrations	1-M
CRMODLS_OBJECTIVE Exam (Objective Id)	CRMODLS_OBJECTIVE	Exams	1-M
CRMODLS_OBJECTIVE ExamRegistration (Objective Id)	CRMODLS_OBJECTIVE	Exam Registrations	1-M-PRIMARY
CRMODLS_OBJECTIVE Fund (Objective Id)	CRMODLS_OBJECTIVE	Funds	1-M
CRMODLS_OBJECTIVE Lead (Objective Id)	CRMODLS_OBJECTIVE	Leads	1-M-PRIMARY
CRMODLS_OBJECTIVE MDFRequest (Objective Id)	CRMODLS_OBJECTIVE	MDF Requests	1-M
CRMODLS_OBJECTIVE MedEdEvent (Objective Id)	CRMODLS_OBJECTIVE	Events	1-M
CRMODLS_OBJECTIVE Opportunity (Objective Id)	CRMODLS_OBJECTIVE	Opportunities	1-M-PRIMARY
CRMODLS_OBJECTIVE Service Request (Objective Id)	CRMODLS_OBJECTIVE	Service Requests	1-M-PRIMARY
CRMODLS_OBJECTIVE SmartCall (Objective Id)	CRMODLS_OBJECTIVE	Smart Calls	1-M
CRMODLS_OBJECTIVE SPRequest (Objective Id)	CRMODLS_OBJECTIVE	Special Pricing Requests	1-M
CRMODLS_OBJECTIVE/Audit Trail Item 2	CRMODLS_OBJECTIVE	Audit Trail	ReadOnly
CRMODLS_OBJECTIVE/ CRMODLS_OBJECTIVE Book	CRMODLS_OBJECTIVE	Books	Child
CRMODLS_OBJECTIVE/ CRMODLS_OBJECTIVETeam	CRMODLS_OBJECTIVE	Objective Teams	Child
CRMODLS_OBJECTIVE_ATTACHMENT	Not applicable	Objective Attachments	Top

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_PCD_MSGRSP	Not applicable	Message Responses	Top
CRMODLS_PCD_MSGRSP CallProdDetail_MsgRsp (Messaging Response Id)	CRMODLS_PCD_MSGRSP	Call Product Detail Message Responses	1-M-PRIMARY
CRMODLS_PCD_MSGRSP Custom Object 1 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 01	1-M-PRIMARY
CRMODLS_PCD_MSGRSP Custom Object 2 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 02	1-M-PRIMARY
CRMODLS_PCD_MSGRSP Custom Object 3 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 03	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject10 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 10	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject11 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 11	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject12 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 12	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject13 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 13	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject14 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 14	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject15 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 15	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject4 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 04	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject5 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 05	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject6 (Message Response Id)	CRMODLS_PCD_MSGRSP	Custom Objects 06	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_PCD_MSGRSP CustomObject7 (Message Response Id)	CRMODLS_PCD_ MSGRSP	Custom Objects 07	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject8 (Message Response Id)	CRMODLS_PCD_ MSGRSP	Custom Objects 08	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject9 (Message Response Id)	CRMODLS_PCD_ MSGRSP	Custom Objects 09	1-M-PRIMARY
CRMODLS_PlanOpportunities	Not applicable	Plan Opportunities	Top
CRMODLS_PlanOpportunities/Audit Trail Item 2	CRMODLS_PlanO pportunities	Audit Trail	ReadOnly
CRMODLS_RELDISC	Not applicable	Related Disclaimers	Top
CRMODLS_RELDISC CRMODLS_SIGNDISC (Primary Disclaimer Id)	CRMODLS_RELD ISC	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_Samp leLot	Custom Objects 01	1-M-PRIMARY
CRMODLS_SampleLot Custom Object 2 (Sample Lot Id)	CRMODLS_Samp leLot	Custom Objects 02	1-M-PRIMARY
CRMODLS_SampleLot Custom Object 3 (Sample Lot Id)	CRMODLS_Samp leLot	Custom Objects 03	1-M-PRIMARY
CRMODLS_SampleLot CustomObject10 (Sample Lot Id)	CRMODLS_Samp leLot	Custom Objects 10	1-M-PRIMARY
CRMODLS_SampleLot CustomObject11 (Sample Lot Id)	CRMODLS_Samp leLot	Custom Objects 11	1-M-PRIMARY
CRMODLS_SampleLot CustomObject12 (Sample Lot Id)	CRMODLS_Samp leLot	Custom Objects 12	1-M-PRIMARY
CRMODLS_SampleLot CustomObject13 (Sample Lot Id)	CRMODLS_Samp leLot	Custom Objects 13	1-M-PRIMARY
CRMODLS_SampleLot CustomObject14 (Sample Lot Id)	CRMODLS_Samp leLot	Custom Objects 14	1-M-PRIMARY
CRMODLS_SampleLot CustomObject15 (Sample Lot Id)	CRMODLS_Samp leLot	Custom Objects 15	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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/Audit Trail Item 2	CRMODLS_SampleLot	Audit Trail	ReadOnly
CRMODLS_SampleLot/ 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 CRMODLS_RELDISC (Parent Id)	CRMODLS_SIGNDISC	Related Disclaimers	Child
CRMODLS_SIGNDISC/Audit Trail Item 2	CRMODLS_SIGNDISC	Audit Trail	ReadOnly
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 87. 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 87. 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 87. 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 87. 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 (Custom Object 1 Id)	CustObj1	Custom Objects 12	1-M-PRIMARY
Custom Object 1 CustomObject13 (Custom Object 1 Id)	CustObj1	Custom Objects 13	1-M-PRIMARY
Custom Object 1 CustomObject14 (Custom Object 1 Id)	CustObj1	Custom Objects 14	1-M-PRIMARY
Custom Object 1 CustomObject15 (Custom Object 1 Id)	CustObj1	Custom Objects 15	1-M-PRIMARY
Custom Object 1 CustomObject4 (Custom Object 1 Id)	CustObj1	Custom Objects 04	1-M-PRIMARY
Custom Object 1 CustomObject5 (Custom Object 1 Id)	CustObj1	Custom Objects 05	1-M-PRIMARY
Custom Object 1 CustomObject6 (Custom Object 1 Id)	CustObj1	Custom Objects 06	1-M-PRIMARY
Custom Object 1 CustomObject7 (Custom Object 1 Id)	CustObj1	Custom Objects 07	1-M-PRIMARY
Custom Object 1 CustomObject8 (Custom Object 1 Id)	CustObj1	Custom Objects 08	1-M-PRIMARY
Custom Object 1 CustomObject9 (Custom Object 1 Id)	CustObj1	Custom Objects 09	1-M-PRIMARY
Custom Object 1 DealRegistration (Custom Object 1 Id)	CustObj1	Deal Registrations	1-M
Custom Object 1 Exam (Custom Object 1 Id)	CustObj1	Exams	1-M
Custom Object 1 FinancialAccount (Custom Object 1 Id)	CustObj1	Financial Accounts	1-M-PRIMARY
Custom Object 1 MDFRequest (Custom Object 1 Id)	CustObj1	MDF Requests	1-M
Custom Object 1 Policy (Custom Object 1 Id)	CustObj1	Policies	1-M
Custom Object 1 SPRequest (Custom Object 1 Id)	CustObj1	Special Pricing Requests	1-M
Custom Object 2 Accreditation (Custom Object 2 Id)	CustObj2	Accreditations	1-M
Custom Object 2 Certification (Custom Object 2 Id)	CustObj2	Certifications	1-M

Table 87. 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 CRMOD_LS_Transactions (Custom Object 2 Id)	CustObj2	Sample Transactions	1-M
Custom Object 2 CRMODLS_InventoryPeriod (Custom Object 2 Id)	CustObj2	Inventory Periods	1-M
Custom Object 2 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 87. 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 87. 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 (Custom Object 3 Id)	CustObj3	Custom Objects 04	1-M-PRIMARY
Custom Object 3 CustomObject5 (Custom Object 3 Id)	CustObj3	Custom Objects 05	1-M-PRIMARY
Custom Object 3 CustomObject6 (Custom Object 3 Id)	CustObj3	Custom Objects 06	1-M-PRIMARY
Custom Object 3 CustomObject7 (Custom Object 3 Id)	CustObj3	Custom Objects 07	1-M-PRIMARY
Custom Object 3 CustomObject8 (Custom Object 3 Id)	CustObj3	Custom Objects 08	1-M-PRIMARY
Custom Object 3 CustomObject9 (Custom Object 3 Id)	CustObj3	Custom Objects 09	1-M-PRIMARY
Custom Object 3 DealRegistration (Custom Object 3 Id)	CustObj3	Deal Registrations	1-M
Custom Object 3 Exam (Custom Object 3 Id)	CustObj3	Exams	1-M
Custom Object 3 FinancialAccount (Custom Object 3 Id)	CustObj3	Financial Accounts	1-M-PRIMARY
Custom Object 3 MDFRequest (Custom Object 3 Id)	CustObj3	MDF Requests	1-M
Custom Object 3 Policy (Custom Object 3 Id)	CustObj3	Policies	1-M
Custom Object 3 SPRequest (Custom Object 3 Id)	CustObj3	Special Pricing Requests	1-M
CustomObject10	Not applicable	Custom Objects 10	Top
CustomObject10 Account (CustomObject10 Id)	CustomObject10	Accounts	1-M
CustomObject10 Accreditation (CustomObject10 Id)	CustomObject10	Accreditations	1-M
CustomObject10 Activity (CustomObject10 Id)	CustomObject10	Activities	1-M-PRIMARY
CustomObject10 Asset (CustomObject10 Id)	CustomObject10	Assets	1-M
CustomObject10 Campaign (CustomObject10 Id)	CustomObject10	Campaigns	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject10 Certification (CustomObject10 Id)	CustomObject10	Certifications	1-M
CustomObject10 Channel Partner (CustomObject10 Id)	CustomObject10	Dealers	1-M
CustomObject10 Cmpltd Activity	CustomObject10	Activities	1-M-PRIMARY
CustomObject10 Contact (CustomObject10 Id)	CustomObject10	Contacts	1-M
CustomObject10 Course (CustomObject10 Id)	CustomObject10	Courses	1-M
CustomObject10 CRMOD_LS_Transactions (CustomObject10 Id)	CustomObject10	Sample Transactions	1-M
CustomObject10 CRMODLS_InventoryPeriod (CustomObject10 Id)	CustomObject10	Inventory Periods	1-M
CustomObject10 CRMODLS_SampleLot (CustomObject10 Id)	CustomObject10	Sample Lots	1-M
CustomObject10 Custom Object 1 (CustomObject10 Id)	CustomObject10	Custom Objects 01	1-M-PRIMARY
CustomObject10 Custom Object 2 (CustomObject10 Id)	CustomObject10	Custom Objects 02	1-M-PRIMARY
CustomObject10 Custom Object 3 (CustomObject10 Id)	CustomObject10	Custom Objects 03	1-M-PRIMARY
CustomObject10 CustomObject10 (CustomObject10 Id)	CustomObject10	Custom Objects 10	1-M-PRIMARY
CustomObject10 CustomObject11 (CustomObject10 Id)	CustomObject10	Custom Objects 11	1-M-PRIMARY
CustomObject10 CustomObject12 (CustomObject10 Id)	CustomObject10	Custom Objects 12	1-M-PRIMARY
CustomObject10 CustomObject13 (CustomObject10 Id)	CustomObject10	Custom Objects 13	1-M-PRIMARY
CustomObject10 CustomObject14 (CustomObject10 Id)	CustomObject10	Custom Objects 14	1-M-PRIMARY
CustomObject10 CustomObject15 (CustomObject10 Id)	CustomObject10	Custom Objects 15	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject10 CustomObject4 (CustomObject10 Id)	CustomObject10	Custom Objects 04	1-M-PRIMARY
CustomObject10 CustomObject5 (CustomObject10 Id)	CustomObject10	Custom Objects 05	1-M-PRIMARY
CustomObject10 CustomObject6 (CustomObject10 Id)	CustomObject10	Custom Objects 06	1-M-PRIMARY
CustomObject10 CustomObject7 (CustomObject10 Id)	CustomObject10	Custom Objects 07	1-M-PRIMARY
CustomObject10 CustomObject8 (CustomObject10 Id)	CustomObject10	Custom Objects 08	1-M-PRIMARY
CustomObject10 CustomObject9 (CustomObject10 Id)	CustomObject10	Custom Objects 09	1-M-PRIMARY
CustomObject10 DealRegistration (CustomObject10 Id)	CustomObject10	Deal Registrations	1-M
CustomObject10 Exam (CustomObject10 Id)	CustomObject10	Exams	1-M
CustomObject10 FinancialAccount (CustomObject10 Id)	CustomObject10	Financial Accounts	1-M-PRIMARY
CustomObject10 Fund (CustomObject10 Id)	CustomObject10	Funds	1-M
CustomObject10 Fund Request (CustomObject10 Id)	CustomObject10	Fund Requests	1-M
CustomObject10 Household (CustomObject10 Id)	CustomObject10	Households	1-M
CustomObject10 Lead (CustomObject10 Id)	CustomObject10	Leads	1-M-PRIMARY
CustomObject10 MDFRequest (CustomObject10 Id)	CustomObject10	MDF Requests	1-M
CustomObject10 MedEdEvent (CustomObject10 Id)	CustomObject10	Events	1-M
CustomObject10 Opportunity (CustomObject10 Id)	CustomObject10	Opportunities	1-M-PRIMARY
CustomObject10 Partner (CustomObject10 Id)	CustomObject10	Partners	1-M
CustomObject10 Policy (CustomObject10 Id)	CustomObject10	Policies	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject10 Portfolio (CustomObject10 Id)	CustomObject10	Portfolios	1-M
CustomObject10 Product (CustomObject10 Id)	CustomObject10	Products	Child
CustomObject10 Program (CustomObject10 Id)	CustomObject10	Partner Programs	1-M
CustomObject10 Revenue (CustomObject10 Id)	CustomObject10	Revenues	Child
CustomObject10 Service Request (CustomObject10 Id)	CustomObject10	Service Requests	1-M-PRIMARY
CustomObject10 SmartCall (CustomObject10 Id)	CustomObject10	Smart Calls	1-M
CustomObject10 Solution (CustomObject10 Id)	CustomObject10	Solutions	1-M
CustomObject10 SPRequest (CustomObject10 Id)	CustomObject10	Special Pricing Requests	1-M
CustomObject10 Vehicle (CustomObject10 Id)	CustomObject10	Vehicles	1-M
CustomObject10/Audit Trail Item 2	CustomObject10	Audit Trail	ReadOnly
CustomObject10/CustomObject10 Book	CustomObject10	Books	Child
CustomObject10/ CustomObject10Team	CustomObject10	Custom Object 10 Teams	Child
CustomObject11	Not applicable	Custom Objects 11	Top
CustomObject11 Account (CustomObject11 Id)	CustomObject11	Accounts	1-M
CustomObject11 Accreditation (CustomObject11 Id)	CustomObject11	Accreditations	1-M
CustomObject11 Activity (CustomObject11 Id)	CustomObject11	Activities	1-M-PRIMARY
CustomObject11 Asset (CustomObject11 Id)	CustomObject11	Assets	1-M
CustomObject11 Campaign (CustomObject11 Id)	CustomObject11	Campaigns	1-M
CustomObject11 Certification (CustomObject11 Id)	CustomObject11	Certifications	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject11 Channel Partner (CustomObject11 Id)	CustomObject11	Dealers	1-M
CustomObject11 Cmpltd Activity	CustomObject11	Activities	1-M-PRIMARY
CustomObject11 Contact (CustomObject11 Id)	CustomObject11	Contacts	1-M
CustomObject11 Course (CustomObject11 Id)	CustomObject11	Courses	1-M
CustomObject11 CRMOD_LS_Transactions (CustomObject11 Id)	CustomObject11	Sample Transactions	1-M
CustomObject11 CRMODLS_InventoryPeriod (CustomObject11 Id)	CustomObject11	Inventory Periods	1-M
CustomObject11 CRMODLS_SampleLot (CustomObject11 Id)	CustomObject11	Sample Lots	1-M
CustomObject11 Custom Object 1 (CustomObject11 Id)	CustomObject11	Custom Objects 01	1-M-PRIMARY
CustomObject11 Custom Object 2 (CustomObject11 Id)	CustomObject11	Custom Objects 02	1-M-PRIMARY
CustomObject11 Custom Object 3 (CustomObject11 Id)	CustomObject11	Custom Objects 03	1-M-PRIMARY
CustomObject11 CustomObject10 (CustomObject11 Id)	CustomObject11	Custom Objects 10	1-M-PRIMARY
CustomObject11 CustomObject11 (CustomObject11 Id)	CustomObject11	Custom Objects 11	1-M-PRIMARY
CustomObject11 CustomObject12 (CustomObject11 Id)	CustomObject11	Custom Objects 12	1-M-PRIMARY
CustomObject11 CustomObject13 (CustomObject11 Id)	CustomObject11	Custom Objects 13	1-M-PRIMARY
CustomObject11 CustomObject14 (CustomObject11 Id)	CustomObject11	Custom Objects 14	1-M-PRIMARY
CustomObject11 CustomObject15 (CustomObject11 Id)	CustomObject11	Custom Objects 15	1-M-PRIMARY
CustomObject11 CustomObject4 (CustomObject11 Id)	CustomObject11	Custom Objects 04	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject11 CustomObject5 (CustomObject11 Id)	CustomObject11	Custom Objects 05	1-M-PRIMARY
CustomObject11 CustomObject6 (CustomObject11 Id)	CustomObject11	Custom Objects 06	1-M-PRIMARY
CustomObject11 CustomObject7 (CustomObject11 Id)	CustomObject11	Custom Objects 07	1-M-PRIMARY
CustomObject11 CustomObject8 (CustomObject11 Id)	CustomObject11	Custom Objects 08	1-M-PRIMARY
CustomObject11 CustomObject9 (CustomObject11 Id)	CustomObject11	Custom Objects 09	1-M-PRIMARY
CustomObject11 DealRegistration (CustomObject11 Id)	CustomObject11	Deal Registrations	1-M
CustomObject11 Exam (CustomObject11 Id)	CustomObject11	Exams	1-M
CustomObject11 FinancialAccount (CustomObject11 Id)	CustomObject11	Financial Accounts	1-M-PRIMARY
CustomObject11 Fund (CustomObject11 Id)	CustomObject11	Funds	1-M
CustomObject11 Fund Request (CustomObject11 Id)	CustomObject11	Fund Requests	1-M
CustomObject11 Household (CustomObject11 Id)	CustomObject11	Households	1-M
CustomObject11 Lead (CustomObject11 Id)	CustomObject11	Leads	1-M-PRIMARY
CustomObject11 MDFRequest (CustomObject11 Id)	CustomObject11	MDF Requests	1-M
CustomObject11 MedEdEvent (CustomObject11 Id)	CustomObject11	Events	1-M
CustomObject11 Opportunity (CustomObject11 Id)	CustomObject11	Opportunities	1-M-PRIMARY
CustomObject11 Partner (CustomObject11 Id)	CustomObject11	Partners	1-M
CustomObject11 Policy (CustomObject11 Id)	CustomObject11	Policies	1-M
CustomObject11 Portfolio (CustomObject11 Id)	CustomObject11	Portfolios	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject11 Product (CustomObject11 Id)	CustomObject11	Products	Child
CustomObject11 Program (CustomObject11 Id)	CustomObject11	Partner Programs	1-M
CustomObject11 Revenue (CustomObject11 Id)	CustomObject11	Revenues	Child
CustomObject11 Service Request (CustomObject11 Id)	CustomObject11	Service Requests	1-M-PRIMARY
CustomObject11 SmartCall (CustomObject11 Id)	CustomObject11	Smart Calls	1-M
CustomObject11 Solution (CustomObject11 Id)	CustomObject11	Solutions	1-M
CustomObject11 SPRequest (CustomObject11 Id)	CustomObject11	Special Pricing Requests	1-M
CustomObject11 Vehicle (CustomObject11 Id)	CustomObject11	Vehicles	1-M
CustomObject11/Audit Trail Item 2	CustomObject11	Audit Trail	ReadOnly
CustomObject11/CustomObject11 Book	CustomObject11	Books	Child
CustomObject11/ CustomObject11Team	CustomObject11	Custom Object 11 Teams	Child
CustomObject12	Not applicable	Custom Objects 12	Top
CustomObject12 Account (CustomObject12 Id)	CustomObject12	Accounts	1-M
CustomObject12 Accreditation (CustomObject12 Id)	CustomObject12	Accreditations	1-M
CustomObject12 Activity (CustomObject12 Id)	CustomObject12	Activities	1-M-PRIMARY
CustomObject12 Asset (CustomObject12 Id)	CustomObject12	Assets	1-M
CustomObject12 Campaign (CustomObject12 Id)	CustomObject12	Campaigns	1-M
CustomObject12 Certification (CustomObject12 Id)	CustomObject12	Certifications	1-M
CustomObject12 Channel Partner (CustomObject12 Id)	CustomObject12	Dealers	1-M

Table 87. 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 (CustomObject12 Id)	CustomObject12	Contacts	1-M
CustomObject12 Course (CustomObject12 Id)	CustomObject12	Courses	1-M
CustomObject12 CRMOD_LS_Transactions (CustomObject12 Id)	CustomObject12	Sample Transactions	1-M
CustomObject12 CRMODLS_InventoryPeriod (CustomObject12 Id)	CustomObject12	Inventory Periods	1-M
CustomObject12 CRMODLS_SampleLot (CustomObject12 Id)	CustomObject12	Sample Lots	1-M
CustomObject12 Custom Object 1 (CustomObject12 Id)	CustomObject12	Custom Objects 01	1-M-PRIMARY
CustomObject12 Custom Object 2 (CustomObject12 Id)	CustomObject12	Custom Objects 02	1-M-PRIMARY
CustomObject12 Custom Object 3 (CustomObject12 Id)	CustomObject12	Custom Objects 03	1-M-PRIMARY
CustomObject12 CustomObject10 (CustomObject12 Id)	CustomObject12	Custom Objects 10	1-M-PRIMARY
CustomObject12 CustomObject11 (CustomObject12 Id)	CustomObject12	Custom Objects 11	1-M-PRIMARY
CustomObject12 CustomObject12 (CustomObject12 Id)	CustomObject12	Custom Objects 12	1-M-PRIMARY
CustomObject12 CustomObject13 (CustomObject12 Id)	CustomObject12	Custom Objects 13	1-M-PRIMARY
CustomObject12 CustomObject14 (CustomObject12 Id)	CustomObject12	Custom Objects 14	1-M-PRIMARY
CustomObject12 CustomObject15 (CustomObject12 Id)	CustomObject12	Custom Objects 15	1-M-PRIMARY
CustomObject12 CustomObject4 (CustomObject12 Id)	CustomObject12	Custom Objects 04	1-M-PRIMARY
CustomObject12 CustomObject5 (CustomObject12 Id)	CustomObject12	Custom Objects 05	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject12 CustomObject6 (CustomObject12 Id)	CustomObject12	Custom Objects 06	1-M-PRIMARY
CustomObject12 CustomObject7 (CustomObject12 Id)	CustomObject12	Custom Objects 07	1-M-PRIMARY
CustomObject12 CustomObject8 (CustomObject12 Id)	CustomObject12	Custom Objects 08	1-M-PRIMARY
CustomObject12 CustomObject9 (CustomObject12 Id)	CustomObject12	Custom Objects 09	1-M-PRIMARY
CustomObject12 DealRegistration (CustomObject12 Id)	CustomObject12	Deal Registrations	1-M
CustomObject12 Exam (CustomObject12 Id)	CustomObject12	Exams	1-M
CustomObject12 FinancialAccount (CustomObject12 Id)	CustomObject12	Financial Accounts	1-M-PRIMARY
CustomObject12 Fund (CustomObject12 Id)	CustomObject12	Funds	1-M
CustomObject12 Fund Request (CustomObject12 Id)	CustomObject12	Fund Requests	1-M
CustomObject12 Household (CustomObject12 Id)	CustomObject12	Households	1-M
CustomObject12 Lead (CustomObject12 Id)	CustomObject12	Leads	1-M-PRIMARY
CustomObject12 MDFRequest (CustomObject12 Id)	CustomObject12	MDF Requests	1-M
CustomObject12 MedEdEvent (CustomObject12 Id)	CustomObject12	Events	1-M
CustomObject12 Opportunity (CustomObject12 Id)	CustomObject12	Opportunities	1-M-PRIMARY
CustomObject12 Partner (CustomObject12 Id)	CustomObject12	Partners	1-M
CustomObject12 Policy (CustomObject12 Id)	CustomObject12	Policies	1-M
CustomObject12 Portfolio (CustomObject12 Id)	CustomObject12	Portfolios	1-M
CustomObject12 Product (CustomObject12 Id)	CustomObject12	Products	Child

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject12 Program (CustomObject12 Id)	CustomObject12	Partner Programs	1-M
CustomObject12 Revenue (CustomObject12 Id)	CustomObject12	Revenues	Child
CustomObject12 Service Request (CustomObject12 Id)	CustomObject12	Service Requests	1-M-PRIMARY
CustomObject12 SmartCall (CustomObject12 Id)	CustomObject12	Smart Calls	1-M
CustomObject12 Solution (CustomObject12 Id)	CustomObject12	Solutions	1-M
CustomObject12 SPRequest (CustomObject12 Id)	CustomObject12	Special Pricing Requests	1-M
CustomObject12 Vehicle (CustomObject12 Id)	CustomObject12	Vehicles	1-M
CustomObject12/Audit Trail Item 2	CustomObject12	Audit Trail	ReadOnly
CustomObject12/CustomObject12 Book	CustomObject12	Books	Child
CustomObject12/ CustomObject12Team	CustomObject12	Custom Object 12 Teams	Child
CustomObject13	Not applicable	Custom Objects 13	Top
CustomObject13 Account (CustomObject13 Id)	CustomObject13	Accounts	1-M
CustomObject13 Accreditation (CustomObject13 Id)	CustomObject13	Accreditations	1-M
CustomObject13 Activity (CustomObject13 Id)	CustomObject13	Activities	1-M-PRIMARY
CustomObject13 Asset (CustomObject13 Id)	CustomObject13	Assets	1-M
CustomObject13 Campaign (CustomObject13 Id)	CustomObject13	Campaigns	1-M
CustomObject13 Certification (CustomObject13 Id)	CustomObject13	Certifications	1-M
CustomObject13 Channel Partner (CustomObject13 Id)	CustomObject13	Dealers	1-M
CustomObject13 Cmpltd Activity	CustomObject13	Activities	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject13 Contact (CustomObject13 Id)	CustomObject13	Contacts	1-M
CustomObject13 Course (CustomObject13 Id)	CustomObject13	Courses	1-M
CustomObject13 CRMOD_LS_Transactions (CustomObject13 Id)	CustomObject13	Sample Transactions	1-M
CustomObject13 CRMODLS_InventoryPeriod (CustomObject13 Id)	CustomObject13	Inventory Periods	1-M
CustomObject13 CRMODLS_SampleLot (CustomObject13 Id)	CustomObject13	Sample Lots	1-M
CustomObject13 Custom Object 1 (CustomObject13 Id)	CustomObject13	Custom Objects 01	1-M-PRIMARY
CustomObject13 Custom Object 2 (CustomObject13 Id)	CustomObject13	Custom Objects 02	1-M-PRIMARY
CustomObject13 Custom Object 3 (CustomObject13 Id)	CustomObject13	Custom Objects 03	1-M-PRIMARY
CustomObject13 CustomObject10 (CustomObject13 Id)	CustomObject13	Custom Objects 10	1-M-PRIMARY
CustomObject13 CustomObject11 (CustomObject13 Id)	CustomObject13	Custom Objects 11	1-M-PRIMARY
CustomObject13 CustomObject12 (CustomObject13 Id)	CustomObject13	Custom Objects 12	1-M-PRIMARY
CustomObject13 CustomObject13 (CustomObject13 Id)	CustomObject13	Custom Objects 13	1-M-PRIMARY
CustomObject13 CustomObject14 (CustomObject13 Id)	CustomObject13	Custom Objects 14	1-M-PRIMARY
CustomObject13 CustomObject15 (CustomObject13 Id)	CustomObject13	Custom Objects 15	1-M-PRIMARY
CustomObject13 CustomObject4 (CustomObject13 Id)	CustomObject13	Custom Objects 04	1-M-PRIMARY
CustomObject13 CustomObject5 (CustomObject13 Id)	CustomObject13	Custom Objects 05	1-M-PRIMARY
CustomObject13 CustomObject6 (CustomObject13 Id)	CustomObject13	Custom Objects 06	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject13 CustomObject7 (CustomObject13 Id)	CustomObject13	Custom Objects 07	1-M-PRIMARY
CustomObject13 CustomObject8 (CustomObject13 Id)	CustomObject13	Custom Objects 08	1-M-PRIMARY
CustomObject13 CustomObject9 (CustomObject13 Id)	CustomObject13	Custom Objects 09	1-M-PRIMARY
CustomObject13 DealRegistration (CustomObject13 Id)	CustomObject13	Deal Registrations	1-M
CustomObject13 Exam (CustomObject13 Id)	CustomObject13	Exams	1-M
CustomObject13 FinancialAccount (CustomObject13 Id)	CustomObject13	Financial Accounts	1-M-PRIMARY
CustomObject13 Fund (CustomObject13 Id)	CustomObject13	Funds	1-M
CustomObject13 Fund Request (CustomObject13 Id)	CustomObject13	Fund Requests	1-M
CustomObject13 Household (CustomObject13 Id)	CustomObject13	Households	1-M
CustomObject13 Lead (CustomObject13 Id)	CustomObject13	Leads	1-M-PRIMARY
CustomObject13 MDFRequest (CustomObject13 Id)	CustomObject13	MDF Requests	1-M
CustomObject13 MedEdEvent (CustomObject13 Id)	CustomObject13	Events	1-M
CustomObject13 Opportunity (CustomObject13 Id)	CustomObject13	Opportunities	1-M-PRIMARY
CustomObject13 Partner (CustomObject13 Id)	CustomObject13	Partners	1-M
CustomObject13 Policy (CustomObject13 Id)	CustomObject13	Policies	1-M
CustomObject13 Portfolio (CustomObject13 Id)	CustomObject13	Portfolios	1-M
CustomObject13 Product (CustomObject13 Id)	CustomObject13	Products	Child
CustomObject13 Program (CustomObject13 Id)	CustomObject13	Partner Programs	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject13 Revenue (CustomObject13 Id)	CustomObject13	Revenues	Child
CustomObject13 Service Request (CustomObject13 Id)	CustomObject13	Service Requests	1-M-PRIMARY
CustomObject13 SmartCall (CustomObject13 Id)	CustomObject13	Smart Calls	1-M
CustomObject13 Solution (CustomObject13 Id)	CustomObject13	Solutions	1-M
CustomObject13 SPRequest (CustomObject13 Id)	CustomObject13	Special Pricing Requests	1-M
CustomObject13 Vehicle (CustomObject13 Id)	CustomObject13	Vehicles	1-M
CustomObject13/Audit Trail Item 2	CustomObject13	Audit Trail	ReadOnly
CustomObject13/CustomObject13 Book	CustomObject13	Books	Child
CustomObject13/ CustomObject13Team	CustomObject13	Custom Object 13 Teams	Child
CustomObject14	Not applicable	Custom Objects 14	Top
CustomObject14 Account (CustomObject14 Id)	CustomObject14	Accounts	1-M
CustomObject14 Accreditation (CustomObject14 Id)	CustomObject14	Accreditations	1-M
CustomObject14 Activity (CustomObject14 Id)	CustomObject14	Activities	1-M-PRIMARY
CustomObject14 Asset (CustomObject14 Id)	CustomObject14	Assets	1-M
CustomObject14 Campaign (CustomObject14 Id)	CustomObject14	Campaigns	1-M
CustomObject14 Certification (CustomObject14 Id)	CustomObject14	Certifications	1-M
CustomObject14 Channel Partner (CustomObject14 Id)	CustomObject14	Dealers	1-M
CustomObject14 Cmpltd Activity	CustomObject14	Activities	1-M-PRIMARY
CustomObject14 Contact (CustomObject14 Id)	CustomObject14	Contacts	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject14 Course (CustomObject14 Id)	CustomObject14	Courses	1-M
CustomObject14 CRMOD_LS_Transactions (CustomObject14 Id)	CustomObject14	Sample Transactions	1-M
CustomObject14 CRMODLS_InventoryPeriod (CustomObject14 Id)	CustomObject14	Inventory Periods	1-M
CustomObject14 CRMODLS_SampleLot (CustomObject14 Id)	CustomObject14	Sample Lots	1-M
CustomObject14 Custom Object 1 (CustomObject14 Id)	CustomObject14	Custom Objects 01	1-M-PRIMARY
CustomObject14 Custom Object 2 (CustomObject14 Id)	CustomObject14	Custom Objects 02	1-M-PRIMARY
CustomObject14 Custom Object 3 (CustomObject14 Id)	CustomObject14	Custom Objects 03	1-M-PRIMARY
CustomObject14 CustomObject10 (CustomObject14 Id)	CustomObject14	Custom Objects 10	1-M-PRIMARY
CustomObject14 CustomObject11 (CustomObject14 Id)	CustomObject14	Custom Objects 11	1-M-PRIMARY
CustomObject14 CustomObject12 (CustomObject14 Id)	CustomObject14	Custom Objects 12	1-M-PRIMARY
CustomObject14 CustomObject13 (CustomObject14 Id)	CustomObject14	Custom Objects 13	1-M-PRIMARY
CustomObject14 CustomObject14 (CustomObject14 Id)	CustomObject14	Custom Objects 14	1-M-PRIMARY
CustomObject14 CustomObject15 (CustomObject14 Id)	CustomObject14	Custom Objects 15	1-M-PRIMARY
CustomObject14 CustomObject4 (CustomObject14 Id)	CustomObject14	Custom Objects 04	1-M-PRIMARY
CustomObject14 CustomObject5 (CustomObject14 Id)	CustomObject14	Custom Objects 05	1-M-PRIMARY
CustomObject14 CustomObject6 (CustomObject14 Id)	CustomObject14	Custom Objects 06	1-M-PRIMARY
CustomObject14 CustomObject7 (CustomObject14 Id)	CustomObject14	Custom Objects 07	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject14 CustomObject8 (CustomObject14 Id)	CustomObject14	Custom Objects 08	1-M-PRIMARY
CustomObject14 CustomObject9 (CustomObject14 Id)	CustomObject14	Custom Objects 09	1-M-PRIMARY
CustomObject14 DealRegistration (CustomObject14 Id)	CustomObject14	Deal Registrations	1-M
CustomObject14 Exam (CustomObject14 Id)	CustomObject14	Exams	1-M
CustomObject14 FinancialAccount (CustomObject14 Id)	CustomObject14	Financial Accounts	1-M-PRIMARY
CustomObject14 Fund (CustomObject14 Id)	CustomObject14	Funds	1-M
CustomObject14 Fund Request (CustomObject14 Id)	CustomObject14	Fund Requests	1-M
CustomObject14 Household (CustomObject14 Id)	CustomObject14	Households	1-M
CustomObject14 Lead (CustomObject14 Id)	CustomObject14	Leads	1-M-PRIMARY
CustomObject14 MDFRequest (CustomObject14 Id)	CustomObject14	MDF Requests	1-M
CustomObject14 MedEdEvent (CustomObject14 Id)	CustomObject14	Events	1-M
CustomObject14 Opportunity (CustomObject14 Id)	CustomObject14	Opportunities	1-M-PRIMARY
CustomObject14 Partner (CustomObject14 Id)	CustomObject14	Partners	1-M
CustomObject14 Policy (CustomObject14 Id)	CustomObject14	Policies	1-M
CustomObject14 Portfolio (CustomObject14 Id)	CustomObject14	Portfolios	1-M
CustomObject14 Product (CustomObject14 Id)	CustomObject14	Products	Child
CustomObject14 Program (CustomObject14 Id)	CustomObject14	Partner Programs	1-M
CustomObject14 Revenue (CustomObject14 Id)	CustomObject14	Revenues	Child

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject14 Service Request (CustomObject14 Id)	CustomObject14	Service Requests	1-M-PRIMARY
CustomObject14 SmartCall (CustomObject14 Id)	CustomObject14	Smart Calls	1-M
CustomObject14 Solution (CustomObject14 Id)	CustomObject14	Solutions	1-M
CustomObject14 SPRequest (CustomObject14 Id)	CustomObject14	Special Pricing Requests	1-M
CustomObject14 Vehicle (CustomObject14 Id)	CustomObject14	Vehicles	1-M
CustomObject14/Audit Trail Item 2	CustomObject14	Audit Trail	ReadOnly
CustomObject14/CustomObject14 Book	CustomObject14	Books	Child
CustomObject14/ CustomObject14Team	CustomObject14	Custom Object 14 Teams	Child
CustomObject15	Not applicable	Custom Objects 15	Top
CustomObject15 Account (CustomObject15 Id)	CustomObject15	Accounts	1-M
CustomObject15 Accreditation (CustomObject15 Id)	CustomObject15	Accreditations	1-M
CustomObject15 Activity (CustomObject15 Id)	CustomObject15	Activities	1-M-PRIMARY
CustomObject15 Asset (CustomObject15 Id)	CustomObject15	Assets	1-M
CustomObject15 Campaign (CustomObject15 Id)	CustomObject15	Campaigns	1-M
CustomObject15 Certification (CustomObject15 Id)	CustomObject15	Certifications	1-M
CustomObject15 Channel Partner (CustomObject15 Id)	CustomObject15	Dealers	1-M
CustomObject15 Cmpltd Activity	CustomObject15	Activities	1-M-PRIMARY
CustomObject15 Contact (CustomObject15 Id)	CustomObject15	Contacts	1-M
CustomObject15 Course (CustomObject15 Id)	CustomObject15	Courses	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject15 CRMOD_LS_Transactions (CustomObject15 Id)	CustomObject15	Sample Transactions	1-M
CustomObject15 CRMODLS_InventoryPeriod (CustomObject15 Id)	CustomObject15	Inventory Periods	1-M
CustomObject15 CRMODLS_SampleLot (CustomObject15 Id)	CustomObject15	Sample Lots	1-M
CustomObject15 Custom Object 1 (CustomObject15 Id)	CustomObject15	Custom Objects 01	1-M-PRIMARY
CustomObject15 Custom Object 2 (CustomObject15 Id)	CustomObject15	Custom Objects 02	1-M-PRIMARY
CustomObject15 Custom Object 3 (CustomObject15 Id)	CustomObject15	Custom Objects 03	1-M-PRIMARY
CustomObject15 CustomObject10 (CustomObject15 Id)	CustomObject15	Custom Objects 10	1-M-PRIMARY
CustomObject15 CustomObject11 (CustomObject15 Id)	CustomObject15	Custom Objects 11	1-M-PRIMARY
CustomObject15 CustomObject12 (CustomObject15 Id)	CustomObject15	Custom Objects 12	1-M-PRIMARY
CustomObject15 CustomObject13 (CustomObject15 Id)	CustomObject15	Custom Objects 13	1-M-PRIMARY
CustomObject15 CustomObject14 (CustomObject15 Id)	CustomObject15	Custom Objects 14	1-M-PRIMARY
CustomObject15 CustomObject15 (CustomObject15 Id)	CustomObject15	Custom Objects 15	1-M-PRIMARY
CustomObject15 CustomObject4 (CustomObject15 Id)	CustomObject15	Custom Objects 04	1-M-PRIMARY
CustomObject15 CustomObject5 (CustomObject15 Id)	CustomObject15	Custom Objects 05	1-M-PRIMARY
CustomObject15 CustomObject6 (CustomObject15 Id)	CustomObject15	Custom Objects 06	1-M-PRIMARY
CustomObject15 CustomObject7 (CustomObject15 Id)	CustomObject15	Custom Objects 07	1-M-PRIMARY
CustomObject15 CustomObject8 (CustomObject15 Id)	CustomObject15	Custom Objects 08	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject15 CustomObject9 (CustomObject15 Id)	CustomObject15	Custom Objects 09	1-M-PRIMARY
CustomObject15 DealRegistration (CustomObject15 Id)	CustomObject15	Deal Registrations	1-M
CustomObject15 Exam (CustomObject15 Id)	CustomObject15	Exams	1-M
CustomObject15 FinancialAccount (CustomObject15 Id)	CustomObject15	Financial Accounts	1-M-PRIMARY
CustomObject15 Fund (CustomObject15 Id)	CustomObject15	Funds	1-M
CustomObject15 Fund Request (CustomObject15 Id)	CustomObject15	Fund Requests	1-M
CustomObject15 Household (CustomObject15 Id)	CustomObject15	Households	1-M
CustomObject15 Lead (CustomObject15 Id)	CustomObject15	Leads	1-M-PRIMARY
CustomObject15 MDFRequest (CustomObject15 Id)	CustomObject15	MDF Requests	1-M
CustomObject15 MedEdEvent (CustomObject15 Id)	CustomObject15	Events	1-M
CustomObject15 Opportunity (CustomObject15 Id)	CustomObject15	Opportunities	1-M-PRIMARY
CustomObject15 Partner (CustomObject15 Id)	CustomObject15	Partners	1-M
CustomObject15 Policy (CustomObject15 Id)	CustomObject15	Policies	1-M
CustomObject15 Portfolio (CustomObject15 Id)	CustomObject15	Portfolios	1-M
CustomObject15 Product (CustomObject15 Id)	CustomObject15	Products	Child
CustomObject15 Program (CustomObject15 Id)	CustomObject15	Partner Programs	1-M
CustomObject15 Revenue (CustomObject15 Id)	CustomObject15	Revenues	Child
CustomObject15 Service Request (CustomObject15 Id)	CustomObject15	Service Requests	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject15 SmartCall (CustomObject15 Id)	CustomObject15	Smart Calls	1-M
CustomObject15 Solution (CustomObject15 Id)	CustomObject15	Solutions	1-M
CustomObject15 SPRequest (CustomObject15 Id)	CustomObject15	Special Pricing Requests	1-M
CustomObject15 Vehicle (CustomObject15 Id)	CustomObject15	Vehicles	1-M
CustomObject15/Audit Trail Item 2	CustomObject15	Audit Trail	ReadOnly
CustomObject15/CustomObject15 Book	CustomObject15	Books	Child
CustomObject15/ CustomObject15Team	CustomObject15	Custom Object 15 Teams	Child
CustomObject4	Not applicable	Custom Objects 04	Top
CustomObject4 Account (CustomObject4 Id)	CustomObject4	Accounts	1-M
CustomObject4 Accreditation (CustomObject4 Id)	CustomObject4	Accreditations	1-M
CustomObject4 Activity (CustomObject4 Id)	CustomObject4	Activities	1-M-PRIMARY
CustomObject4 Asset (CustomObject4 Id)	CustomObject4	Assets	1-M
CustomObject4 Campaign (CustomObject4 Id)	CustomObject4	Campaigns	1-M
CustomObject4 Certification (CustomObject4 Id)	CustomObject4	Certifications	1-M
CustomObject4 Channel Partner (CustomObject4 Id)	CustomObject4	Dealers	1-M
CustomObject4 Cmpltd Activity	CustomObject4	Activities	1-M-PRIMARY
CustomObject4 Contact (CustomObject4 Id)	CustomObject4	Contacts	1-M
CustomObject4 Course (CustomObject4 Id)	CustomObject4	Courses	1-M
CustomObject4 CRMOD_LS_Transactions (CustomObject4 Id)	CustomObject4	Sample Transactions	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject4 CRMODLS_InventoryPeriod (CustomObject4 Id)	CustomObject4	Inventory Periods	1-M
CustomObject4 CRMODLS_SampleLot (CustomObject4 Id)	CustomObject4	Sample Lots	1-M
CustomObject4 Custom Object 1 (CustomObject4 Id)	CustomObject4	Custom Objects 01	1-M-PRIMARY
CustomObject4 Custom Object 2 (CustomObject4 Id)	CustomObject4	Custom Objects 02	1-M-PRIMARY
CustomObject4 Custom Object 3 (CustomObject4 Id)	CustomObject4	Custom Objects 03	1-M-PRIMARY
CustomObject4 CustomObject10 (CustomObject4 Id)	CustomObject4	Custom Objects 10	1-M-PRIMARY
CustomObject4 CustomObject11 (CustomObject4 Id)	CustomObject4	Custom Objects 11	1-M-PRIMARY
CustomObject4 CustomObject12 (CustomObject4 Id)	CustomObject4	Custom Objects 12	1-M-PRIMARY
CustomObject4 CustomObject13 (CustomObject4 Id)	CustomObject4	Custom Objects 13	1-M-PRIMARY
CustomObject4 CustomObject14 (CustomObject4 Id)	CustomObject4	Custom Objects 14	1-M-PRIMARY
CustomObject4 CustomObject15 (CustomObject4 Id)	CustomObject4	Custom Objects 15	1-M-PRIMARY
CustomObject4 CustomObject4 (CustomObject4 Id)	CustomObject4	Custom Objects 04	1-M-PRIMARY
CustomObject4 CustomObject5 (CustomObject4 Id)	CustomObject4	Custom Objects 05	1-M-PRIMARY
CustomObject4 CustomObject6 (CustomObject4 Id)	CustomObject4	Custom Objects 06	1-M-PRIMARY
CustomObject4 CustomObject7 (CustomObject4 Id)	CustomObject4	Custom Objects 07	1-M-PRIMARY
CustomObject4 CustomObject8 (CustomObject4 Id)	CustomObject4	Custom Objects 08	1-M-PRIMARY
CustomObject4 CustomObject9 (CustomObject4 Id)	CustomObject4	Custom Objects 09	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject4 DealRegistration (CustomObject4 Id)	CustomObject4	Deal Registrations	1-M
CustomObject4 Exam (CustomObject4 Id)	CustomObject4	Exams	1-M
CustomObject4 FinancialAccount (CustomObject4 Id)	CustomObject4	Financial Accounts	1-M-PRIMARY
CustomObject4 Fund (CustomObject4 Id)	CustomObject4	Funds	1-M
CustomObject4 Fund Request (CustomObject4 Id)	CustomObject4	Fund Requests	1-M
CustomObject4 Household (CustomObject4 Id)	CustomObject4	Households	1-M
CustomObject4 Lead (CustomObject4 Id)	CustomObject4	Leads	1-M-PRIMARY
CustomObject4 MDFRequest (CustomObject4 Id)	CustomObject4	MDF Requests	1-M
CustomObject4 MedEdEvent (CustomObject4 Id)	CustomObject4	Events	1-M
CustomObject4 Opportunity (CustomObject4 Id)	CustomObject4	Opportunities	1-M-PRIMARY
CustomObject4 Partner (CustomObject4 Id)	CustomObject4	Partners	1-M
CustomObject4 Policy (CustomObject4 Id)	CustomObject4	Policies	1-M
CustomObject4 Portfolio (CustomObject4 Id)	CustomObject4	Portfolios	1-M
CustomObject4 Product (CustomObject4 Id)	CustomObject4	Products	Child
CustomObject4 Program (CustomObject4 Id)	CustomObject4	Partner Programs	1-M
CustomObject4 Revenue (CustomObject4 Id)	CustomObject4	Revenues	Child
CustomObject4 Service Request (CustomObject4 Id)	CustomObject4	Service Requests	1-M-PRIMARY
CustomObject4 SmartCall (CustomObject4 Id)	CustomObject4	Smart Calls	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject4 Solution (CustomObject4 Id)	CustomObject4	Solutions	1-M
CustomObject4 SPRequest (CustomObject4 Id)	CustomObject4	Special Pricing Requests	1-M
CustomObject4 Vehicle (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 (CustomObject5 Id)	CustomObject5	Accounts	1-M
CustomObject5 Accreditation (CustomObject5 Id)	CustomObject5	Accreditations	1-M
CustomObject5 Activity (CustomObject5 Id)	CustomObject5	Activities	1-M-PRIMARY
CustomObject5 Asset (CustomObject5 Id)	CustomObject5	Assets	1-M
CustomObject5 Campaign (CustomObject5 Id)	CustomObject5	Campaigns	1-M
CustomObject5 Certification (CustomObject5 Id)	CustomObject5	Certifications	1-M
CustomObject5 Channel Partner (CustomObject5 Id)	CustomObject5	Dealers	1-M
CustomObject5 Cmpltd Activity	CustomObject5	Activities	1-M-PRIMARY
CustomObject5 Contact (CustomObject5 Id)	CustomObject5	Contacts	1-M
CustomObject5 Course (CustomObject5 Id)	CustomObject5	Courses	1-M
CustomObject5 CRMOD_LS_Transactions (CustomObject5 Id)	CustomObject5	Sample Transactions	1-M
CustomObject5 CRMODLS_InventoryPeriod (CustomObject5 Id)	CustomObject5	Inventory Periods	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject5 CRMODLS_SampleLot (CustomObject5 Id)	CustomObject5	Sample Lots	1-M
CustomObject5 Custom Object 1 (CustomObject5 Id)	CustomObject5	Custom Objects 01	1-M-PRIMARY
CustomObject5 Custom Object 2 (CustomObject5 Id)	CustomObject5	Custom Objects 02	1-M-PRIMARY
CustomObject5 Custom Object 3 (CustomObject5 Id)	CustomObject5	Custom Objects 03	1-M-PRIMARY
CustomObject5 CustomObject10 (CustomObject5 Id)	CustomObject5	Custom Objects 10	1-M-PRIMARY
CustomObject5 CustomObject11 (CustomObject5 Id)	CustomObject5	Custom Objects 11	1-M-PRIMARY
CustomObject5 CustomObject12 (CustomObject5 Id)	CustomObject5	Custom Objects 12	1-M-PRIMARY
CustomObject5 CustomObject13 (CustomObject5 Id)	CustomObject5	Custom Objects 13	1-M-PRIMARY
CustomObject5 CustomObject14 (CustomObject5 Id)	CustomObject5	Custom Objects 14	1-M-PRIMARY
CustomObject5 CustomObject15 (CustomObject5 Id)	CustomObject5	Custom Objects 15	1-M-PRIMARY
CustomObject5 CustomObject4 (CustomObject5 Id)	CustomObject5	Custom Objects 04	1-M-PRIMARY
CustomObject5 CustomObject5 (CustomObject5 Id)	CustomObject5	Custom Objects 05	1-M-PRIMARY
CustomObject5 CustomObject6 (CustomObject5 Id)	CustomObject5	Custom Objects 06	1-M-PRIMARY
CustomObject5 CustomObject7 (CustomObject5 Id)	CustomObject5	Custom Objects 07	1-M-PRIMARY
CustomObject5 CustomObject8 (CustomObject5 Id)	CustomObject5	Custom Objects 08	1-M-PRIMARY
CustomObject5 CustomObject9 (CustomObject5 Id)	CustomObject5	Custom Objects 09	1-M-PRIMARY
CustomObject5 DealRegistration (CustomObject5 Id)	CustomObject5	Deal Registrations	1-M
CustomObject5 Exam (CustomObject5 Id)	CustomObject5	Exams	1-M

Table 87. 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 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject5 Vehicle (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 Teams	Child
CustomObject6	Not applicable	Custom Objects 06	Top
CustomObject6 Account (CustomObject6 Id)	CustomObject6	Accounts	1-M
CustomObject6 Accreditation (CustomObject6 Id)	CustomObject6	Accreditations	1-M
CustomObject6 Activity (CustomObject6 Id)	CustomObject6	Activities	1-M-PRIMARY
CustomObject6 Asset (CustomObject6 Id)	CustomObject6	Assets	1-M
CustomObject6 Campaign (CustomObject6 Id)	CustomObject6	Campaigns	1-M
CustomObject6 Certification (CustomObject6 Id)	CustomObject6	Certifications	1-M
CustomObject6 Channel Partner (CustomObject6 Id)	CustomObject6	Dealers	1-M
CustomObject6 Cmpltd Activity	CustomObject6	Activities	1-M-PRIMARY
CustomObject6 Contact (CustomObject6 Id)	CustomObject6	Contacts	1-M
CustomObject6 Course (CustomObject6 Id)	CustomObject6	Courses	1-M
CustomObject6 CRMOD_LS_Transactions (CustomObject6 Id)	CustomObject6	Sample Transactions	1-M
CustomObject6 CRMODLS_InventoryPeriod (CustomObject6 Id)	CustomObject6	Inventory Periods	1-M
CustomObject6 CRMODLS_SampleLot (CustomObject6 Id)	CustomObject6	Sample Lots	1-M
CustomObject6 Custom Object 1 (CustomObject6 Id)	CustomObject6	Custom Objects 01	1-M-PRIMARY

Table 87. 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 87. 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 87. 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 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject7 CustomObject10 (CustomObject7 Id)	CustomObject7	Custom Objects 10	1-M-PRIMARY
CustomObject7 CustomObject11 (CustomObject7 Id)	CustomObject7	Custom Objects 11	1-M-PRIMARY
CustomObject7 CustomObject12 (CustomObject7 Id)	CustomObject7	Custom Objects 12	1-M-PRIMARY
CustomObject7 CustomObject13 (CustomObject7 Id)	CustomObject7	Custom Objects 13	1-M-PRIMARY
CustomObject7 CustomObject14 (CustomObject7 Id)	CustomObject7	Custom Objects 14	1-M-PRIMARY
CustomObject7 CustomObject15 (CustomObject7 Id)	CustomObject7	Custom Objects 15	1-M-PRIMARY
CustomObject7 CustomObject4 (CustomObject7 Id)	CustomObject7	Custom Objects 04	1-M-PRIMARY
CustomObject7 CustomObject5 (CustomObject7 Id)	CustomObject7	Custom Objects 05	1-M-PRIMARY
CustomObject7 CustomObject6 (CustomObject7 Id)	CustomObject7	Custom Objects 06	1-M-PRIMARY
CustomObject7 CustomObject7 (CustomObject7 Id)	CustomObject7	Custom Objects 07	1-M-PRIMARY
CustomObject7 CustomObject8 (CustomObject7 Id)	CustomObject7	Custom Objects 08	1-M-PRIMARY
CustomObject7 CustomObject9 (CustomObject7 Id)	CustomObject7	Custom Objects 09	1-M-PRIMARY
CustomObject7 DealRegistration (CustomObject7 Id)	CustomObject7	Deal Registrations	1-M
CustomObject7 Exam (CustomObject7 Id)	CustomObject7	Exams	1-M
CustomObject7 FinancialAccount (CustomObject7 Id)	CustomObject7	Financial Accounts	1-M-PRIMARY
CustomObject7 Fund (CustomObject7 Id)	CustomObject7	Funds	1-M
CustomObject7 Fund Request (CustomObject7 Id)	CustomObject7	Fund Requests	1-M
CustomObject7 Household (CustomObject7 Id)	CustomObject7	Households	1-M

Table 87. 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 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject8 Account (CustomObject8 Id)	CustomObject8	Accounts	1-M
CustomObject8 Accreditation (CustomObject8 Id)	CustomObject8	Accreditations	1-M
CustomObject8 Activity (CustomObject8 Id)	CustomObject8	Activities	1-M-PRIMARY
CustomObject8 Asset (CustomObject8 Id)	CustomObject8	Assets	1-M
CustomObject8 Campaign (CustomObject8 Id)	CustomObject8	Campaigns	1-M
CustomObject8 Certification (CustomObject8 Id)	CustomObject8	Certifications	1-M
CustomObject8 Channel Partner (CustomObject8 Id)	CustomObject8	Dealers	1-M
CustomObject8 Cmpltd Activity	CustomObject8	Activities	1-M-PRIMARY
CustomObject8 Contact (CustomObject8 Id)	CustomObject8	Contacts	1-M
CustomObject8 Course (CustomObject8 Id)	CustomObject8	Courses	1-M
CustomObject8 CRMOD_LS_Transactions (CustomObject8 Id)	CustomObject8	Sample Transactions	1-M
CustomObject8 CRMODLS_InventoryPeriod (CustomObject8 Id)	CustomObject8	Inventory Periods	1-M
CustomObject8 CRMODLS_SampleLot (CustomObject8 Id)	CustomObject8	Sample Lots	1-M
CustomObject8 Custom Object 1 (CustomObject8 Id)	CustomObject8	Custom Objects 01	1-M-PRIMARY
CustomObject8 Custom Object 2 (CustomObject8 Id)	CustomObject8	Custom Objects 02	1-M-PRIMARY
CustomObject8 Custom Object 3 (CustomObject8 Id)	CustomObject8	Custom Objects 03	1-M-PRIMARY
CustomObject8 CustomObject10 (CustomObject8 Id)	CustomObject8	Custom Objects 10	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject8 CustomObject11 (CustomObject8 Id)	CustomObject8	Custom Objects 11	1-M-PRIMARY
CustomObject8 CustomObject12 (CustomObject8 Id)	CustomObject8	Custom Objects 12	1-M-PRIMARY
CustomObject8 CustomObject13 (CustomObject8 Id)	CustomObject8	Custom Objects 13	1-M-PRIMARY
CustomObject8 CustomObject14 (CustomObject8 Id)	CustomObject8	Custom Objects 14	1-M-PRIMARY
CustomObject8 CustomObject15 (CustomObject8 Id)	CustomObject8	Custom Objects 15	1-M-PRIMARY
CustomObject8 CustomObject4 (CustomObject8 Id)	CustomObject8	Custom Objects 04	1-M-PRIMARY
CustomObject8 CustomObject5 (CustomObject8 Id)	CustomObject8	Custom Objects 05	1-M-PRIMARY
CustomObject8 CustomObject6 (CustomObject8 Id)	CustomObject8	Custom Objects 06	1-M-PRIMARY
CustomObject8 CustomObject7 (CustomObject8 Id)	CustomObject8	Custom Objects 07	1-M-PRIMARY
CustomObject8 CustomObject8 (CustomObject8 Id)	CustomObject8	Custom Objects 08	1-M-PRIMARY
CustomObject8 CustomObject9 (CustomObject8 Id)	CustomObject8	Custom Objects 09	1-M-PRIMARY
CustomObject8 DealRegistration (CustomObject8 Id)	CustomObject8	Deal Registrations	1-M
CustomObject8 Exam (CustomObject8 Id)	CustomObject8	Exams	1-M
CustomObject8 FinancialAccount (CustomObject8 Id)	CustomObject8	Financial Accounts	1-M-PRIMARY
CustomObject8 Fund (CustomObject8 Id)	CustomObject8	Funds	1-M
CustomObject8 Fund Request (CustomObject8 Id)	CustomObject8	Fund Requests	1-M
CustomObject8 Household (CustomObject8 Id)	CustomObject8	Households	1-M
CustomObject8 Lead (CustomObject8 Id)	CustomObject8	Leads	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject8 MDFRequest (CustomObject8 Id)	CustomObject8	MDF Requests	1-M
CustomObject8 MedEdEvent (CustomObject8 Id)	CustomObject8	Events	1-M
CustomObject8 Opportunity (CustomObject8 Id)	CustomObject8	Opportunities	1-M-PRIMARY
CustomObject8 Partner (CustomObject8 Id)	CustomObject8	Partners	1-M
CustomObject8 Policy (CustomObject8 Id)	CustomObject8	Policies	1-M
CustomObject8 Portfolio (CustomObject8 Id)	CustomObject8	Portfolios	1-M
CustomObject8 Product (CustomObject8 Id)	CustomObject8	Products	Child
CustomObject8 Program (CustomObject8 Id)	CustomObject8	Partner Programs	1-M
CustomObject8 Revenue (CustomObject8 Id)	CustomObject8	Revenues	Child
CustomObject8 Service Request (CustomObject8 Id)	CustomObject8	Service Requests	1-M-PRIMARY
CustomObject8 SmartCall (CustomObject8 Id)	CustomObject8	Smart Calls	1-M
CustomObject8 Solution (CustomObject8 Id)	CustomObject8	Solutions	1-M
CustomObject8 SPRequest (CustomObject8 Id)	CustomObject8	Special Pricing Requests	1-M
CustomObject8 Vehicle (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 (CustomObject9 Id)	CustomObject9	Accounts	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject9 Accreditation (CustomObject9 Id)	CustomObject9	Accreditations	1-M
CustomObject9 Activity (CustomObject9 Id)	CustomObject9	Activities	1-M-PRIMARY
CustomObject9 Asset (CustomObject9 Id)	CustomObject9	Assets	1-M
CustomObject9 Campaign (CustomObject9 Id)	CustomObject9	Campaigns	1-M
CustomObject9 Certification (CustomObject9 Id)	CustomObject9	Certifications	1-M
CustomObject9 Channel Partner (CustomObject9 Id)	CustomObject9	Dealers	1-M
CustomObject9 Cmpltd Activity	CustomObject9	Activities	1-M-PRIMARY
CustomObject9 Contact (CustomObject9 Id)	CustomObject9	Contacts	1-M
CustomObject9 Course (CustomObject9 Id)	CustomObject9	Courses	1-M
CustomObject9 CRMOD_LS_Transactions (CustomObject9 Id)	CustomObject9	Sample Transactions	1-M
CustomObject9 CRMODLS_InventoryPeriod (CustomObject9 Id)	CustomObject9	Inventory Periods	1-M
CustomObject9 CRMODLS_SampleLot (CustomObject9 Id)	CustomObject9	Sample Lots	1-M
CustomObject9 Custom Object 1 (CustomObject9 Id)	CustomObject9	Custom Objects 01	1-M-PRIMARY
CustomObject9 Custom Object 2 (CustomObject9 Id)	CustomObject9	Custom Objects 02	1-M-PRIMARY
CustomObject9 Custom Object 3 (CustomObject9 Id)	CustomObject9	Custom Objects 03	1-M-PRIMARY
CustomObject9 CustomObject10 (CustomObject9 Id)	CustomObject9	Custom Objects 10	1-M-PRIMARY
CustomObject9 CustomObject11 (CustomObject9 Id)	CustomObject9	Custom Objects 11	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject9 CustomObject12 (CustomObject9 Id)	CustomObject9	Custom Objects 12	1-M-PRIMARY
CustomObject9 CustomObject13 (CustomObject9 Id)	CustomObject9	Custom Objects 13	1-M-PRIMARY
CustomObject9 CustomObject14 (CustomObject9 Id)	CustomObject9	Custom Objects 14	1-M-PRIMARY
CustomObject9 CustomObject15 (CustomObject9 Id)	CustomObject9	Custom Objects 15	1-M-PRIMARY
CustomObject9 CustomObject4 (CustomObject9 Id)	CustomObject9	Custom Objects 04	1-M-PRIMARY
CustomObject9 CustomObject5 (CustomObject9 Id)	CustomObject9	Custom Objects 05	1-M-PRIMARY
CustomObject9 CustomObject6 (CustomObject9 Id)	CustomObject9	Custom Objects 06	1-M-PRIMARY
CustomObject9 CustomObject7 (CustomObject9 Id)	CustomObject9	Custom Objects 07	1-M-PRIMARY
CustomObject9 CustomObject8 (CustomObject9 Id)	CustomObject9	Custom Objects 08	1-M-PRIMARY
CustomObject9 CustomObject9 (CustomObject9 Id)	CustomObject9	Custom Objects 09	1-M-PRIMARY
CustomObject9 DealRegistration (CustomObject9 Id)	CustomObject9	Deal Registrations	1-M
CustomObject9 Exam (CustomObject9 Id)	CustomObject9	Exams	1-M
CustomObject9 FinancialAccount (CustomObject9 Id)	CustomObject9	Financial Accounts	1-M-PRIMARY
CustomObject9 Fund (CustomObject9 Id)	CustomObject9	Funds	1-M
CustomObject9 Fund Request (CustomObject9 Id)	CustomObject9	Fund Requests	1-M
CustomObject9 Household (CustomObject9 Id)	CustomObject9	Households	1-M
CustomObject9 Lead (CustomObject9 Id)	CustomObject9	Leads	1-M-PRIMARY
CustomObject9 MDFRequest (CustomObject9 Id)	CustomObject9	MDF Requests	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject9 MedEdEvent (CustomObject9 Id)	CustomObject9	Events	1-M
CustomObject9 Opportunity (CustomObject9 Id)	CustomObject9	Opportunities	1-M-PRIMARY
CustomObject9 Partner (CustomObject9 Id)	CustomObject9	Partners	1-M
CustomObject9 Policy (CustomObject9 Id)	CustomObject9	Policies	1-M
CustomObject9 Portfolio (CustomObject9 Id)	CustomObject9	Portfolios	1-M
CustomObject9 Product (CustomObject9 Id)	CustomObject9	Products	Child
CustomObject9 Program (CustomObject9 Id)	CustomObject9	Partner Programs	1-M
CustomObject9 Revenue (CustomObject9 Id)	CustomObject9	Revenues	Child
CustomObject9 Service Request (CustomObject9 Id)	CustomObject9	Service Requests	1-M-PRIMARY
CustomObject9 SmartCall (CustomObject9 Id)	CustomObject9	Smart Calls	1-M
CustomObject9 Solution (CustomObject9 Id)	CustomObject9	Solutions	1-M
CustomObject9 SPRequest (CustomObject9 Id)	CustomObject9	Special Pricing Requests	1-M
CustomObject9 Vehicle (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
Damage/Audit Trail Item 2			
Dealer	Not applicable	Dealer	Top
Dealer Addr	Dealer	Addresses	Child

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Dealer Att	Dealer	Attachments	Child
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
DealRegistration CustomObject12 (Deal Registration Id)	DealRegistration	Custom Objects 12	1-M-PRIMARY
DealRegistration CustomObject13 (Deal Registration Id)	DealRegistration	Custom Objects 13	1-M-PRIMARY
DealRegistration CustomObject14 (Deal Registration Id)	DealRegistration	Custom Objects 14	1-M-PRIMARY
DealRegistration CustomObject15 (Deal Registration Id)	DealRegistration	Custom Objects 15	1-M-PRIMARY
DealRegistration CustomObject4 (Deal Registration Id)	DealRegistration	Custom Objects 04	1-M-PRIMARY
DealRegistration CustomObject5 (Deal Registration Id)	DealRegistration	Custom Objects 05	1-M-PRIMARY
DealRegistration CustomObject6 (Deal Registration Id)	DealRegistration	Custom Objects 06	1-M-PRIMARY
DealRegistration CustomObject7 (Deal Registration Id)	DealRegistration	Custom Objects 07	1-M-PRIMARY
DealRegistration CustomObject8 (Deal Registration Id)	DealRegistration	Custom Objects 08	1-M-PRIMARY
DealRegistration CustomObject9 (Deal Registration Id)	DealRegistration	Custom Objects 09	1-M-PRIMARY
DealRegistration DealRegistrationRevenue (Deal Registration Id)	DealRegistration	Deal Registration Product Revenues	Child
DealRegistration Lead (Deal Registration Id)	DealRegistration	Leads	1-M-PRIMARY
DealRegistration SmartCall (DealRegistration Id)	DealRegistration	Smart Calls	1-M
DealRegistration SPRequest (Deal Registration Id)	DealRegistration	Special Pricing Requests	1-M
DealRegistration/Audit Trail Item 2	DealRegistration	Audit Trail	ReadOnly
DealRegistration/DealRegistration Book	DealRegistration	Books	Child
DealRegistration/ DealRegistrationTeam	DealRegistration	Deal Registration Teams	Child
DealRegistrationRevenue	Not applicable	Deal Registration Product Revenues	Top

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Employee	Not applicable		Top
Exam	Not applicable	Exams	Top
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 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/Audit Trail Item 2	Exam	Audit Trail	ReadOnly
Exam/Exam Book	Exam	Books	Child

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Exam/ExamTeam	Exam	Exam Teams	Child
ExamAttachment	Not applicable	Exam Attachments	Top
ExamCategory	Not applicable	Exam Product Product Categories	Top
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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/Audit Trail Item 2	FinancialAccount	Audit Trail	ReadOnly
FinancialAccount/FinancialAccount Book	FinancialAccount	Books	Child

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
FinancialAccountHolder	Not applicable	Financial Account Holders	Top
FinancialAccountHolder/Audit Trail Item 2	FinancialAccount Holder	Audit Trail	ReadOnly
FinancialAccountHolding	Not applicable	Financial Account Holdings	Top
FinancialAccountHolding/Audit Trail Item 2	FinancialAccount Holding	Audit Trail	ReadOnly
FinancialPlan	Not applicable	Financial Plans	Top
FinancialPlan Activity (Financial Plan Id)	FinancialPlan	Activities	1-M-PRIMARY
FinancialPlan Cmpltd Activity	FinancialPlan	Activities	1-M-PRIMARY
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/Audit Trail Item 2	FinancialPlan	Audit Trail	ReadOnly
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
FinancialProduct/Audit Trail Item 2	FinancialProduct	Audit Trail	ReadOnly
FinancialTransaction	Not applicable	Financial Transactions	Top

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
FinancialTransaction FinancialTransaction (Financial Transaction Parent Id)	FinancialTransaction	Financial Transactions	1-M
FinancialTransaction Service Request (Financial Transaction Id)	FinancialTransaction	Service Requests	1-M-PRIMARY
FinancialTransaction/Audit Trail Item 2	FinancialTransaction	Audit Trail	ReadOnly
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
HCPContactAllocation/ 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 (Household Id)	Household	Custom Objects 10	1-M-PRIMARY
Household CustomObject11 (Household Id)	Household	Custom Objects 11	1-M-PRIMARY
Household CustomObject12 (Household Id)	Household	Custom Objects 12	1-M-PRIMARY

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Household CustomObject13 (Household Id)	Household	Custom Objects 13	1-M-PRIMARY
Household CustomObject14 (Household Id)	Household	Custom Objects 14	1-M-PRIMARY
Household CustomObject15 (Household Id)	Household	Custom Objects 15	1-M-PRIMARY
Household CustomObject4 (Household Id)	Household	Custom Objects 04	1-M-PRIMARY
Household CustomObject5 (Household Id)	Household	Custom Objects 05	1-M-PRIMARY
Household CustomObject6 (Household Id)	Household	Custom Objects 06	1-M-PRIMARY
Household CustomObject7 (Household Id)	Household	Custom Objects 07	1-M-PRIMARY
Household CustomObject8 (Household Id)	Household	Custom Objects 08	1-M-PRIMARY
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
InsuranceProperty/Audit Trail Item 2	InsuranceProperty	Audit Trail	ReadOnly
InvolvedParty	Not applicable	Involved Parties	Top
InvolvedParty/Audit Trail Item 2	InvolvedParty	Audit Trail	ReadOnly
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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_OBJECTIVE	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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Opportunity	Not applicable	Opportunity	Top
Opportunity CRMODLS_PlanOpportunities (Opportunity Id)	Opportunity	Plan Opportunities	1-M-PRIMARY
Opportunity CustomObject10 (Opportunity Id)	Opportunity	Custom Objects 10	1-M-PRIMARY
Opportunity CustomObject11 (Opportunity Id)	Opportunity	Custom Objects 11	1-M-PRIMARY
Opportunity CustomObject12 (Opportunity Id)	Opportunity	Custom Objects 12	1-M-PRIMARY
Opportunity CustomObject13 (Opportunity Id)	Opportunity	Custom Objects 13	1-M-PRIMARY
Opportunity CustomObject14 (Opportunity Id)	Opportunity	Custom Objects 14	1-M-PRIMARY
Opportunity CustomObject15 (Opportunity Id)	Opportunity	Custom Objects 15	1-M-PRIMARY
Opportunity CustomObject4 (Opportunity Id)	Opportunity	Custom Objects 04	1-M-PRIMARY
Opportunity CustomObject5 (Opportunity Id)	Opportunity	Custom Objects 05	1-M-PRIMARY
Opportunity CustomObject6 (Opportunity Id)	Opportunity	Custom Objects 06	1-M-PRIMARY
Opportunity CustomObject7 (Opportunity Id)	Opportunity	Custom Objects 07	1-M-PRIMARY
Opportunity CustomObject8 (Opportunity Id)	Opportunity	Custom Objects 08	1-M-PRIMARY
Opportunity CustomObject9 (Opportunity Id)	Opportunity	Custom Objects 09	1-M-PRIMARY
Opportunity DealRegistration (Opportunity Id)	Opportunity	Deal Registrations	1-M
Opportunity Opportunity (Parent opty Id)	Opportunity	Sub- Opportunities	1-M-PRIMARY
Opportunity OpportunityEvent (Opportunity Id)	Opportunity	Opportunity Event	Child
Opportunity Order (Opportunity Id)	Opportunity	Orders	1-M
Opportunity Quote (Opportunity Id)	Opportunity	Quotes	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Opportunity Service Request (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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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/Audit Trail Item 2	Order	Audit Trail	ReadOnly
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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
PolicyHolder/Audit Trail Item 2	PolicyHolder	Audit Trail	ReadOnly

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
ProductIndication/Audit Trail Item 2	ProductIndication	Audit Trail	ReadOnly
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
Quote/Audit Trail Item 2	Quote	Audit Trail	ReadOnly
SA Value	Sales Assmt	Values	Child
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
Service Request CustomObject7 (Service Request Id)	Service Request	Custom Objects 07	1-M-PRIMARY
Service Request CustomObject8 (Service Request Id)	Service Request	Custom Objects 08	1-M-PRIMARY
Service Request CustomObject9 (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 (Address Id)	SharedAddress	Dealers	1-M

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
SharedAddress Contact (Address Id)	SharedAddress	Contacts	1-M
SharedAddress Custom Object 1 (Address Id)	SharedAddress	Custom Objects 01	1-M-PRIMARY
SharedAddress Custom Object 2 (Address Id)	SharedAddress	Custom Objects 02	1-M-PRIMARY
SharedAddress Custom Object 3 (Address Id)	SharedAddress	Custom Objects 03	1-M-PRIMARY
SharedAddress CustomObject10 (Address Id)	SharedAddress	Custom Objects 10	1-M-PRIMARY
SharedAddress CustomObject11 (Address Id)	SharedAddress	Custom Objects 11	1-M-PRIMARY
SharedAddress CustomObject12 (Address Id)	SharedAddress	Custom Objects 12	1-M-PRIMARY
SharedAddress CustomObject13 (Address Id)	SharedAddress	Custom Objects 13	1-M-PRIMARY
SharedAddress CustomObject14 (Address Id)	SharedAddress	Custom Objects 14	1-M-PRIMARY
SharedAddress CustomObject15 (Address Id)	SharedAddress	Custom Objects 15	1-M-PRIMARY
SharedAddress CustomObject4 (Address Id)	SharedAddress	Custom Objects 04	1-M-PRIMARY
SharedAddress CustomObject5 (Address Id)	SharedAddress	Custom Objects 05	1-M-PRIMARY
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
SocialMedia Service Request (Social Media Source Id)	SocialMedia	Service Requests	1-M-PRIMARY
SocialMedia/Audit Trail Item 2	SocialMedia	Audit Trail	ReadOnly
SocialProfile	Not applicable	Social Profiles	Top
SocialProfile/Audit Trail Item 2	SocialProfile	Audit Trail	ReadOnly
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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
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

Table 87. Access Object Names and Corresponding ENU Display Names

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
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 88 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 88. 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

Table 88. 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: 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
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 447
- Modern Theme Icons on page 459

Classic Theme Icons

This topic lists the icons used for customized record types and Detail page Web applets in the corresponding XML files.

Table 89 lists the classic theme icons and their file names as provided with Oracle CRM On Demand.

Table 89. Classic Theme Icons

Icon Name	Icon
1006.gif	
1033.gif	
1048.gif	
1056.gif	
1801.gif	
1824.gif	
1826.gif	

Table 89. 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 89. 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 89. 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 89. 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 89. 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 89. 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 89. 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 89. 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 89. 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 89. 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 89. 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 89. Classic Theme Icons

Icon Name	Icon
weather_sun.png	
webpage_status.gif	
world.png	
zoom.png	

Modern Theme Icons

Table 90 lists the modern theme icons and their file names as provided with Oracle CRM On Demand.

Table 90. 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 90. 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 90. 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 90. 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 90. 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 90. 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 90. Modern Theme Icons

Icon Name	Icon
mod_mdfrequest_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 90. 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 90. 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 90. 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 90. 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 90. Modern Theme Icons

Icon Name	Icon
mod_user_25.png	
mod_vehicle_25.png	

D System Names for Record Types

This appendix contains the following topic:

- System Names for Record Types on page 471

System Names for Record Types

Table 91 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 91. 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 91. 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
Analytics	Analytics
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 91. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

Object System Name	Display Name (ENU)
CallActivityHistory	Call Activity History **NOTE:** 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 91. 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 91. 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 91. 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 91. System Names for Record Types in the Oracle CRM On Demand ENU User Interface

Object System Name	Display Name (ENU)
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 91. 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 91. 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 91. 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 91. 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 91. 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 91. 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 485

Homepage Section Layout Mapping

Table 92 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 objects: Forecast, Daily Calendar, and Analytics.

Table 92. 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 92. 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 92. 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	OptyList	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 92. 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_MsgPlnRel	CRMOD_LS_MsgPlnRel.AllList	Messaging Plan Item Relations Lists
CRMOD_LS_MsgPlnRel	CRMOD_LS_MsgPlnRel.AllRecentlyModified	Recently Modified Messaging Plan Item Relations

Table 92. 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 92. 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 92. 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 92. 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 92. 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 92. 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 92. 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 92. 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	HomepageOptyList	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 92. 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

Table 92. 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	HomepageSRList	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 92. 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 501

Privilege IDs and Their Corresponding Names and Descriptions

Table 93 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 93. 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 93. 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, Assessments and Analytics report folders. **NOTE:** This privilege does not apply to the analytics folders in the V3 catalog. It applies to the report folders in the V2 catalog only.
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.

Table 93. 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_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.
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 Any Field	Data Management	Update values across multiple records for a record type.
ADMIN_MASS_UPDATE_EDITABLE_FIELDS	Mass Update Editable Fields Available on the Page Layout	Data Management	Allow mass update on fields available on page layout but not read-only.
ADMIN_MERGE_RECORDS	Merge Records	Data Management	Merge duplicate records into single master record.

Table 93. 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_MERGE_RECORDS_WITHOUT_DELETE	Merge Records Without Delete Access	Data Management	Merge duplicate records into single master record even when the user does not have delete access.
ADMIN_PERSONAL_EXTRACT	Manage Personal Extract	Data Management: Export	Manage and generate personal extracts for offline clients.
ADMIN_SHARED_ADDRS	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.
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.

Table 93. 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)
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.
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_EXT_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.

Table 93. 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)
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_PUB_SMART_CALLS	Calls: Create Public Smart Calls	Industry Specific: Life Sciences	Create public Smart Call templates.
CRM_DESKTOP_INT	Enable CRM Desktop Access	Desktop/Mobile	Download the CRM Desktop Client and synchronize data with CRM On Demand.
CRM_DESKTOP_LITE_INT	Enable CRM Desktop Lite Access	Desktop/Mobile	Download the CRM Desktop Lite Client and synchronize data with CRM On Demand.
CTI_ACCESS_CALL	Access Call Communications	Integration: CTI	Access to calls from Communication Homepage.
CTI_ACCESS_CHAT	Access Chat Communications	Integration: CTI	Access to chats from Communication Homepage.
CTI_ACCESS_EMAIL	Access Email Communications	Integration: CTI	Access to emails from Communication Homepage.
CTI_ACCESS_VMAIL	Access Voicemail Communications	Integration: CTI	Access to voicemails from Communication Homepage.
CUSTOMIZE_APP	Customize Application	Customization	Create custom page layouts, homepage layouts, change field names, modify field picklists, define cascading picklists, create custom fields and rename objects.

Table 93. 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_ASSIGN_RULES	Data Rules and Assignment	Customization: Business Rules	Define routing rules for Leads, Accounts, Opportunities and Service Requests. Administer Forecasts, Lead Conversion Mapping and Lead Conversion Layouts, and set up Industry picklist values.
DEFINE_CURRENCIES	Manage Company - Define Currencies	Admin: Company Administration	Manage currencies and exchange rates.
DEFINE_PUBLIC_LISTS	Manage Public Lists	Data Management	Create, Edit and Delete Public Lists.
DEFINE_SALES_PROCESS	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.
DELETE_EXPORT_REQ_ATT	Delete Export Request Attachments	Data Management: Export	Ability to delete attachments for requests in the Export Queue.
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

Table 93. 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)
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.
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.

Table 93. 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_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_OBJ1115	Customize Application - Manage Custom Objects 11-15	Customization: Data	Manage access to Custom Objects 11-15.
GRANT_CUSTOM_OBJ1620	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_OBJ2125	Customize Application - Manage Custom Objects 21-25	Customization: Data	Manage access to Custom Objects 21-25.
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.

Table 93. 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_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.
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

Table 93. 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_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.
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.

Table 93. 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)
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.
MANAGE_BOOKS	Manage Books	Admin: Users and Access Controls	Manage Book access, bulk assign data to Books and define Book related workflows.
MANAGE_CAMPAIGNS	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.

Table 93. 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_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_PRIVATE_LISTS	Manage Private Lists	Data Management	View and Edit Private Lists created by any users of your company.
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
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.

Table 93. 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)
MASTER_EXPORT_REQS	Access Master Export Requests	Admin: Company Administration	View all Data Export Assistant Export requests and List Export requests.
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_STATUS	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.
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.

Table 93. 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)
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.
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.

Table 93. 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)
TAB_ANALYTICS	Access Analytics Dashboards	Analytics	Access the Analytics Dashboard. **NOTE:** This privilege applies to V2 analytics only.
TAB_ANALYTICS_V3	Access V3 Analytics	Analytics	Access the V3 Analytics Tab for Reports and Dashboards
TAB_COMMUNICATIONS	Access Communications Homepage	Contact On Demand	Access the Communications homepage.
TAB_REPORTS	Access Analytics Reports	Analytics	Access the Analytics Reports tab. **NOTE:** This privilege applies to V2 analytics only.
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_ADDRS	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_MIGRATED_SHARED_FOLDER	Access Migrated Company Wide Shared Folder	Analytics	Access the Migrated Company Wide Shared Folder in Analytics Catalog
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 93. 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 519

Child Applet IDs and Their Corresponding Names

Table 94 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 94. 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 94. 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 94. 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 94. 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	Audit Trail.ChildList	Audit Trail
Accreditation	Custom Object 1.ChildList	Custom Objects 01
Accreditation	Custom Object 2.ChildList	Custom Objects 02

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Accreditation	Custom Object 3.ChildList	Custom Objects 03
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Activity	Order.ChildList	Orders
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Appointment	CustomObject7.ChildList	Custom Objects 07
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Attendee Call	CustomObject6.ChildList	Custom Objects 06
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
BlockedProduct	Audit Trail.ChildList	Audit Trail
BrokerProfile	Audit Trail.ChildList	Audit Trail
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	Audit Trail.ChildList	Audit Trail
Campaign	Campaign Book.ChildList	Books
Campaign	CampaignContChildList	Recipients

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Campaign	CampaignFAChildList	Attachments
Campaign	CampaignNoteChildList	Notes
Campaign	CustObj1ChildList	Custom Objects 01
Campaign	CustObj2ChildList	Custom Objects 02
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	Audit Trail.ChildList	Audit Trail
Certification	Certification Book.ChildList	Books
Certification	CertificationAttachment.ChildList	Certification Attachments

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Certification	CertificationCourse.ChildList	Certification Courses
Certification	CertificationExam.ChildList	Certification Exams
Certification	CertificationProduct.ChildList	Certification Products
Certification	CertificationProductCategory.ChildList	Certification Product Product Categories
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	Audit Trail.ChildList	Audit Trail
Channel Partner	ChannelPartnerTerritoryChildList	Territories
Channel Partner	CustObj1ChildList	Custom Objects 01
Channel Partner	CustObj2ChildList	Custom Objects 02

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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	Audit Trail.ChildList	Audit Trail
Claim	Damage.ChildList	Damages
Claim	InvolvedParty.ChildList	Involved Parties

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Contact	ContactBookChildList	Books
Contact	ContactCallChildList	Calls
Contact	ContactCampChildList	Campaigns
Contact	ContactCustSatSurveyChildList	Customer Satisfaction Surveys
Contact	ContactFAChildList	Attachments
Contact	ContactHouseholdChildList	Household
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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	Audit Trail.ChildList	Audit Trail
Course	CertificationCourse.ChildList	Certification Courses
Course	Course Book.ChildList	Books
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Course	CustomObject8.ChildList	Custom Objects 08
Course	CustomObject9.ChildList	Custom Objects 09
Coverage	Audit Trail.ChildList	Audit Trail
CRMOD_LS_Allocation	Audit Trail.ChildList	Audit Trail
CRMOD_LS_Allocation	CRMOD_LS_Allocation Book.ChildList	Books
CRMOD_LS_ContactLicenses	Audit Trail.ChildList	Audit Trail
CRMOD_LS_MessagingPlan	Audit Trail.ChildList	Audit Trail
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
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	Audit Trail.ChildList	Audit Trail
CRMOD_LS_MsgPlanItem	CallProdDetail_MsgPlanItem.ChildList	Call Product Detail Messaging Plan Items

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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	Audit Trail.ChildList	Audit Trail
CRMOD_LS_MsgPlnRel	CallProdDetail_MsgPlnRel.ChildList	Call Product Detail Messaging Plan Item 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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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	Audit Trail.ChildList	Audit Trail
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
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_BPL_ACNT	Audit Trail.ChildList	Audit Trail
CRMODLS_BPL_CNTCT	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
CRMODLS_InventoryAuditReport	Audit Trail.ChildList	Audit Trail
CRMODLS_InventoryAuditReport	CRMODLS_InventoryAuditReport Book.ChildList	Books
CRMODLS_InventoryAuditReport	CRMODLS_SampleInventory.ChildList	Sample Inventory
CRMODLS_InventoryPeriod	Audit Trail.ChildList	Audit Trail
CRMODLS_InventoryPeriod	CRMOD_LS_Transactions.ChildList	Sample Transactions
CRMODLS_InventoryPeriod	CRMODLS_InventoryAuditReport.ChildList	Inventory Audit Reports
CRMODLS_InventoryPeriod	CRMODLS_InventoryPeriod Book.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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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.ChildList	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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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_PlanOpportunities	Audit Trail.ChildList	Audit Trail
CRMODLS_SampleLot	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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	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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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	CRMOD_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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
CustomObject9	TaskOpenChildList	Open Tasks
CustomObject9	Vehicle.ChildList	Vehicles
Damage	Audit Trail.ChildList	Audit Trail
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Exam	Audit Trail.ChildList	Audit Trail
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
Exam	ExamRelationship.ChildList	Related Exams
Exam	ExamSolution.ChildList	Exam Solutions
Exam	ExamTeam.ChildList	Exam Teams
FinancialAccount	Activity.ChildList	Activities
FinancialAccount	ActivityClosedChildList	Completed Activities

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
FinancialAccount	AppointmentOpenChildList	Open Appointments
FinancialAccount	Audit Trail.ChildList	Audit Trail
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
FinancialAccount	Service Request.ChildList	Service Requests
FinancialAccount	TaskOpenChildList	Open Tasks
FinancialAccountHolder	Audit Trail.ChildList	Audit Trail
FinancialAccountHolding	Audit Trail.ChildList	Audit Trail

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
FinancialPlan	Activity.ChildList	Activities
FinancialPlan	ActivityClosedChildList	Completed Activities
FinancialPlan	AppointmentOpenChildList	Open Appointments
FinancialPlan	Audit Trail.ChildList	Audit Trail
FinancialPlan	FinancialPlan Book.ChildList	Books
FinancialPlan	Lead.ChildList	Leads
FinancialPlan	Opportunity.ChildList	Opportunities
FinancialPlan	Service Request.ChildList	Service Requests
FinancialPlan	TaskOpenChildList	Open Tasks
FinancialProduct	Audit Trail.ChildList	Audit Trail
FinancialProduct	Coverage.ChildList	Coverages
FinancialProduct	FinancialAccountHolding.ChildList	Financial Account Holdings
FinancialProduct	FinancialProduct.SelfChildList	Financial Products
FinancialProduct	FinancialTransaction.ChildList	Financial Transactions
FinancialTransaction	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Fund	CustomObject4.ChildList	Custom Objects 04
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Fund Request	CustomObject7.ChildList	Custom Objects 07
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Household	HouseholdActivityOpenChildList	Open Activities
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	Audit Trail.ChildList	Audit Trail
InsuranceProperty	Coverage.ChildList	Coverages
InsuranceProperty	Damage.ChildList	Damages
InvolvedParty	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Lead	CustomObject5.ChildList	Custom Objects 05
Lead	CustomObject6.ChildList	Custom Objects 06
Lead	CustomObject7.ChildList	Custom Objects 07
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
MDFRequest	CustomObject9.ChildList	Custom Objects 09
MDFRequest	MDFRequest Book.ChildList	Books
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
MedEdEvent	MedEdFAChildList	Attachments
MedEdEvent	MedEdInviteeChildList	Invitees
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Opportunity	OpportunityCompetitorChildList	Opportunity Competitors
Opportunity	OpportunityEvent.ChildList	Opportunity Event
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	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Order	CustomObject9.ChildList	Custom Objects 09
Order	Order Book.ChildList	Books
Order	OrderItem.ChildList	Order Items
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Partner	CustObj3ChildList	Custom Objects 03
Partner	CustomObject10.ChildList	Custom Objects 10
Partner	CustomObject11.ChildList	Custom Objects 11
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Partner	PartnerProgramChildList	Program Memberships
Partner	PartnerRelationshipChildList	Partner Relationships
Partner	PartnerRoleChildList	Partner User Roles
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Policy	CustomObject15.ChildList	Custom Objects 15
Policy	CustomObject4.ChildList	Custom Objects 04
Policy	CustomObject5.ChildList	Custom Objects 05
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
PolicyHolder	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
Portfolio	CustomObject5.ChildList	Custom Objects 05
Portfolio	CustomObject6.ChildList	Custom Objects 06
Portfolio	CustomObject7.ChildList	Custom Objects 07
Portfolio	CustomObject8.ChildList	Custom Objects 08
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
ProductIndication	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
Program	Opportunity.ChildList	Opportunities
Program	ProgramAttachment.ChildList	Partner Program Attachments
Program	ProgramBookChildList	Books
Program	ProgramMembershipChildList	Program Memberships
Program	SPRequest.ChildList	Special Pricing Requests
Quote	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
SmartCall	SmartCallProdDetailChildList	Products Detailed
SmartCall	SmartCallPromItemDropChildList	Promotional Items
SmartCall	SmartCallSampDropChildList	Samples Dropped
SocialMedia	Audit Trail.ChildList	Audit Trail
SocialMedia	Service Request.ChildList	Service Requests
SocialProfile	Audit Trail.ChildList	Audit Trail
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
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

Table 94. Child Applet IDs and Their Corresponding Names in Page Layout XML Files

Object System Name	Child Applet Id	Child Applet Name
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
Vehicle	VehicleSalesHistChildList	Sales History
Vehicle	VehicleServHistChildList	Service History

H 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 595
- Troubleshooting on page 596

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 95 describes possible error conditions and their remedies.

Table 95. Error Messages and Conditions

Error Message or Condition	Cause	Remedy
<java:string xmlns:java=""java.io"">com.bea.xml.XmlRuntimeException: error: cvc-maxLength-valid.1.1: string length (77) is greater than maxLength facet (75) for string75 in namespace.	A field's display name exceeds the maximum length allowed.	Review the display names specified and make sure none of them exceed the maximum length allowed.
<?xml version = '1.0' encoding = 'UTF-8'?> <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/""><faultcode xmlns="""">env:Server</faultcode><faultstring xmlns="""">Invalid input value 'Cust related info for Contract' for 'RelatedInformationLayoutName'(SBL-ODS-50854)</faultstring><faultactor xmlns=""""/></env:Fault>	The related information page layout was not migrated before the upsert was performed.	Migrate the related information page layout before performing the upsert.

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