Administering Oracle CRM On Demand

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Administering Oracle CRM On Demand

Use the Administrator pages to set up and customise Oracle CRM On Demand. For more information about administering Oracle CRM On Demand, see the following sections:

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In addition, administrators can usually perform the following:

- Create custom reports for their own use or for company-wide distribution. For instructions, see Working with the Analytics Homepage.
- Create filtered lists for company-wide distribution. For instructions, see Working with Lists.

For information about using Oracle On Demand Expression Builder, see Expression Builder (on page 845).

Processes for Administering Oracle CRM On Demand

The Administrator pages in Oracle CRM On Demand allow you to manage the deployment of Oracle CRM On Demand to your users and the setting up of your data requirements. Using the Administrator pages, you can customise the appearance of Oracle CRM On Demand to meet your specific business requirements. Use the following guidelines to manage your deployment of Oracle CRM On Demand:

1. Review all available resources.

   Before you set up a new Oracle CRM On Demand deployment, review the following resources:

   - Read the *Oracle CRM On Demand Administrator Preview Guide*. This guide is available to all company administrators and provides information on how to enable functionality in Oracle CRM On Demand. For more information on how to access the *Oracle CRM On Demand Administrator Preview Guide*, click the Training and Support link in Oracle CRM On Demand.
   - Review the additional tools, templates, checklists, Web seminars, and guides by clicking the Training and Support link in Oracle CRM On Demand.
   - Enrol in the Administration Essentials course offered by Oracle University.

2. Evaluate your business processes and the roles that users play within your organisation.

   Review the *Oracle CRM On Demand Administrator Rollout Guide* available on My Oracle Support. Download and use the Custom Field Set-up Template to plan your deployment properly from the start. The Custom Field Set-up Template is available in the Tools and Templates page in the Training and Support Centre in My Oracle Support.

   - Define data visibility and how the data will be secured by considering the following factors and functionality:
     - **Access Profiles.** For more information, see Access Profile Management (on page 317).
     - **Teams.** For more information, see Sharing Records (Teams).
     - **Books.** For more information, see Book Management (on page 338).
     - **Manager Visibility.** For more information, see Setting Up Your Company Profile and Global Defaults (on page 19).
   - Define the data model and relevant fields. Evaluate which reports require trend analysis, real-time trend analysis, and the record types that they support.
   - Define the following processes associated with validating and interacting with data:

- Setting up sales processes. For more information see Setting Up Sales Processes, Categories, and Coaches (see "Setting Up Sales Processes, Categories and Coaches" on page 528).
- Defining lead conversion layouts and field mappings. For more information, see Lead Conversion Administration (on page 515).
- Defining field validation. For more information, see About Field Management (on page 106).
- Defining workflow processes. For more information, see Business Process Management (on page 407).
- Integrating Oracle CRM On Demand with Web services. For more information, see Web Services Integration (on page 790).

- Define Customer Test Environments (CTEs) and any additional environments for training and testing.

3 Set up your company.

Each company is unique. In Oracle CRM On Demand, you can customise many company settings so that they match your business set-up.

- Set up your company's fiscal year, languages, currencies, exchange rates, and so on.
- Request the appropriate access rights and CTE. For more information on setting up your company, see Setting Up Your Company Profile and Global Defaults (on page 19).

4 Set up your user profiles.

Users in a company have specific roles and responsibilities. Some users have access to certain data, while others do not. Before adding these users, set up the visibility and role for each type of user.

- Set up the roles for your Oracle CRM On Demand users. For more information, see Adding Roles (on page 309).
- Set up the access profiles for your company. For more information, see Access Profile Management (on page 317).
- Set up your visibility model, for example, books, teams, and so on. For more information, see Book Management (on page 338) and Sharing Records (Teams).

5 Configure the data model, for example, add or rename fields, record types, and so on.

Data requirements are also unique in a company. In Oracle CRM On Demand you can add new fields to existing record types, rename fields to match your business terms, or add new custom record types. Before you start to add data, do the following:

- Add the new fields and record types required for the definition of your data model. For more information, see Creating and Editing Fields (on page 125) and Adding Record Types (on page 250).
- Rename the fields and record types to match your specific business terms. For more information, see Managing Field Labels (on page 152) and Renaming Record Types (on page 246).
- Populate picklists. You can use the import functionality to import large numbers of picklist values to picklist fields quickly. For more information, see Changing Picklist Values (on page 158).
- Configure layouts. Display only the fields required for each role and to use dynamic layouts. For more information, see Customising Static Page Layouts (on page 165) and Specifying Dynamic Page Layouts (on page 213).

- Configure your processes such as workflows, sales processes, and so on. For more information, see Business Process Management (on page 407) and Setting Up Sales Processes, Categories, and Coaches (see "Setting Up Sales Processes, Categories and Coaches" on page 528).
- Configure lists for roles. The first 10 lists appear on a user's homepage. It is recommended that lists do not return large amounts of data. Twenty-five to 100 records is the recommended manageable number of records for daily tasks. It is also recommended to do the following:
  - Use indexed fields whenever possible.
  - In the list, include fields that users want to update frequently.

  For more information on configuring lists, see Creating and Refining Lists.

6 Provide information about business metrics by generating reports.

Use the Analytics functionality in Oracle CRM On Demand to generate custom reports that are relevant to your business needs, and then make them accessible to users. For more information on reports, see Analytics.

7 Import your data and users.

Use the import functionality to import legacy data to Oracle CRM On Demand. You can import all of your users, or add them all manually through the User Management page. When users have been added, they receive an email with their temporary password to access Oracle CRM On Demand, and they can start working immediately. For more information on importing data, see Import and Export Tools (on page 558).

Using Administrator Templates During Setup

You can use administrator setup templates to help you organise your company's information and implement Oracle CRM On Demand efficiently.

After you have entered your information in the templates, you can use the templates as a reference during setup and customisation of the application.

To access administrator set-up templates

1 Click the link for the template that you want.

Links for the available templates are shown in the following section.

2 Save the template to your computer.

3 Open the saved file.

About Usage Tracking in Oracle CRM On Demand

Usage tracking functionality allows companies to monitor and analyse the usage of their Oracle CRM On Demand application, including user usage, application usage, and setup and configuration details. A number of prebuilt reports on usage tracking are provided for reporting on the Oracle CRM On Demand usage. In addition to the prebuilt reports, the Usage Tracking Analysis subject area is available in the Historical Analytics area in Analytics for companies that want to further analyse their Oracle CRM On Demand usage.

For example, you might want to create reports to provide information about the following:

- Users who did not sign in during the last 30 days
- Record types for which no records were created, updated, or deleted in the last 30 days
- The number of workflow rules, custom fields, and custom tabs that have been created in Oracle CRM On Demand

TIP: For information about reviewing Web services usage, see Reviewing Web Services Utilisation (on page 793).

To access the usage tracking reports and to create new reports in the Usage Tracking Analysis subject area, you must have the Usage Tracking privilege in your user role. The Usage Tracking privilege is enabled by default for the company administrator's role.

About the Usage Tracking Privilege

Company administrators can enable the Usage Tracking privilege for other user roles as necessary. However, before you enable the Usage Tracking privilege for a user role, consider the following implications of enabling the privilege:

- Users who have the Usage Tracking privilege in their user role can access the Usage Tracking Analysis subject area in Analytics, as well as the prebuilt reports on usage tracking.
- Access to usage tracking data is not secured by any other access settings, such as the access settings for record types in access profiles and user roles. Therefore, users who have the Usage Tracking privilege in their role can access all of the usage tracking data in the Usage Tracking Analysis subject area.

  Because some of your company's usage data might be considered sensitive, you must ensure that only the appropriate users are granted the Usage Tracking privilege.
- Usage tracking reporting can result in intensive use of system resources.

If you want to make some usage tracking reports available to certain users, but you do not want the users to have full access to the Usage Tracking Analysis subject area and prebuilt reports, consider creating custom reports that contain the relevant data. Then, you can store the custom reports in a shared reports folder, and give the users access to the shared folder only.

In Oracle CRM On Demand, you can view data about service allotment usage, see Viewing Service Allotment Usage for Your Company (on page 90) and Viewing Historical Service Allotment Usage (on page 91) and data about file and record usage, see Viewing File and Record Utilisation Information (on page 93).

Related Topics

For more information about the Usage Tracking Analysis subject area and about reports, see the following topics:

- Usage Tracking Analytic Subject Area
- Getting Started with Analytics

Company Administration

Before you begin. Unless otherwise indicated, to perform the procedures described in the Company Administration section, your role must include the Manage Company privilege.

Click a topic to see step-by-step instructions for the procedures pertaining to Company Administration:

- Setting Up Your Company Profile and Global Defaults (on page 19)
- Verifying Licence Statuses and Active Users (see "Verifying License Statuses and Active Users" on page 47)
- Defining Your Company's Password Controls (on page 49)
- Resetting All Passwords (on page 57)
- Activating Languages (on page 57)
- Defining a Custom Fiscal Calendar (on page 61)
- Managing Currencies (on page 65)
- Creating Divisions (on page 71)
- Associating Picklist Value Groups with Divisions (on page 72)
- Associating Users with Divisions (on page 72)
- Reviewing Sign-In Activity for All Users (on page 77)
- Restricting Use to IP Addresses (on page 58)
- Reviewing Your Company's Resource Usage (on page 78)
- Reviewing Audit Trail Changes with the Master Audit Trail (on page 79)
- Publishing Company-Wide Alerts (on page 86)
- Viewing Service Allotment Usage for Your Company (on page 90)
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- Setting Alerts for Service Allotments (on page 92)
- Viewing File and Record Utilisation Information (on page 93)
- Converting Unshared Addresses to Shared Addresses (on page 95)
- Considerations When Turning Off Shared Addresses (on page 98)
  - Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses (on page 99)
- Setting the Address Type for Unshared Addresses Using Edit Rel (on page 100)
- Access Profile and Role Settings for Addresses (on page 100)

Company Profile

Setting up the company profile includes:

- Setting Up Your Company Profile and Global Defaults (on page 19)
- Verifying Licence Statuses and Active Users (see "Verifying License Statuses and Active Users" on page 47)
- Defining Your Company's Password Controls (on page 49)
- Resetting All Passwords (on page 57)
- Activating Languages (on page 57)
- Restricting Use to IP Addresses (on page 58)

Setting Up Your Company Profile and Global Defaults

Both company information and global defaults are set through the Company Profile page.

Company Information. You can enter or edit your company name, shipping and invoicing addresses, phone number and primary contact. If you signed up for a trial period, some information about your company is carried over from your sign-up data.

Global Defaults. You can define your company-wide defaults, which users can override.

CAUTION: The company administrator can change the Country setting. If you change the Country setting, notify Customer Care so that it can take the necessary steps to update your Time Zone setting, as well as your reports and dashboards. Language, Currency and Time Zone can only be changed by contacting Customer Care. Your new settings are not reflected in Analytics until a full ETL (Extract, Transform, Load) is run.

Before you begin. To understand the effect of these settings, read About Profile Settings for Users.

To perform this procedure, your role must include the Manage Company privilege.

To edit your company profile

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Profile section, click the Company Profile link.
4. On the Company Profile page, click the Edit button (or use inline edit) and make changes.
5. Save the record.

For more information on setting up your company profile, see the following topics:

- Configuring Company Key Information (on page 20)

- Configuring Company Settings (on page 21)
- Configuring Company Work Week and Calendar Settings (on page 34)
- Configuring Lead Settings (on page 36)
- Configuring Company Theme Settings (on page 37)
- Configuring Company Data Visibility Settings (on page 37)
- Configuring Integration Settings (on page 40)
- Configuring Company Security Settings (on page 41)
- Configuring Analytics Visibility Settings (on page 45)
- Configuring Communications Settings (on page 46)
- Configuring Additional Company Profile Settings (on page 47)
- Configuring Geocoder Settings (on page 47)

NOTE: In certain circumstances, the Modified By field on the Company Profile record can show the name of a user who does not have the necessary access rights and privileges to update the company profile directly. For example, when the status of a user is changed from Active to Inactive or from Inactive to Active, the values in the Active Users and Inactive Users fields on the Company Profile page are updated. As a result of the changes to these fields, the Modified By field on the Company Profile page is updated to show the name of the user who updated the user record, even if the user who made that change does not have the necessary privilege to update the company profile.

Configuring Company Key Information

The following table describes how you set up the Company Key Information section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Company Sign In ID	A unique identifier for your company. When creating new users this is the first portion of the User Sign In ID (Company Sign In ID/User ID) for the user. Your company administrator cannot change this value.

Field	Description
Primary Contact	Defaults to ADMIN or to the alias of the first user from your company who signs in, but can be changed to any user. Product update and other important information are sent to the primary contact. To cover situation when the primary contact is not available, you can enter a distribution list as the email address for the primary contact so that more than one person is notified of system failures and other important information. You can do this in either of two ways: ■ You can enter an existing distribution list as the email address on the user record for the primary contact. However, you must remember that if the primary contact does something in the system that sends an automated email to his or her email address, the entire distribution list receives that notification. ■ You can create a new "dummy" user. You could name this user something like "DistributionList", and then enter the distribution list as the email address on the user record for the dummy user. In this case, you are committing one of your licences just for this task. **NOTE:** You cannot make the user specified as your primary contact inactive. Instead, you must select another user for the primary contact before you can change the original primary contact's status to Inactive.

Configuring Company Settings

The following table describes how to set up the Company Settings section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Default Language	The language used as the default language for your users. You can activate additional languages so that users can change the setting for their own use. For information on how to add languages, see Activating Languages (on page 57). To update this field, contact Customer Care.
Default Locale	The regional settings used as the default settings for your users. Users can change the setting for their own use at any time from the User Profile page. These settings determine the formatting for dates, time, currency, numbers and phone numbers.
Default Currency	The currency used as the default currency for your users. You can activate additional currencies so that users can change the setting for their own use (see Managing Currencies (on page 65)). However, the currency set here determines the default

Field	Description
	currency used for forecasts, which are company-wide. To update this field, contact Customer Care.
Default Time Zone	Default time zone for your company. Some functions, such as forecast generation, use the time zone of the hosting facility instead of this default time zone. Contact Customer Care to find out this time zone. Users in other regions can choose to use their local time zone, which is set on the User Profile page. To update this field, contact Customer Care.
Record Preview Mode	The record preview mode for your company. You can enable the record preview functionality, and specify how the preview window opens. Depending on the setting that you select in this field, a preview window opens when users rest their pointer on a link to a record, or when they click a preview icon that appears when they rest their pointer on a link to a record. The preview window shows the first section of the Detail page of the record. You also have the option of disabling the record preview functionality by selecting Off in this field. By default, this field is set to Click on Preview Icon when Oracle CRM On Demand is first set up for a new company. Users can override the company setting by specifying a different record preview mode in their Personal Detail page.
Inline Edit Enabled	Enables or disables the inline editing feature. When inline editing is enabled, users can edit fields directly on List pages and on Detail pages (that is, without opening the Edit page for the record). Inline editing is supported in record List pages, record Detail pages, and in many linked records on main record Detail pages. Note that the following types of fields in linked records cannot be edited from the Detail page of the main record: ■ Fields that are not shown in the Detail page of the linked record itself ■ Calculated fields, for example, Full Name ■ Fields that are read-only on the Edit page of the linked record Also, in cases where the same linked record can show up under multiple main records, the fields that are part of the relationship can be edited. However, the fields that belong to the linked record itself cannot be edited. For example in the Account Team related list on an account record, the Team Role field can be edited, because the field is part of the relationship between the account and the team member. However, the Last Name and

Field	Description
	First Name fields cannot be edited, because they belong to the user record (of the team member).
Message Centre Enabled	Controls whether: ■ The Message Centre appears in the Action bar. ■ The Notes icon and list of notes is available in Record detail pages. ■ Users can use the Message Centre widget.
Record Type Auditable Fields	This field specifies the maximum number of fields that can be audited for each record type. The default number is 35, but you can change this value. **NOTE:** With each additional field audited, another record must be created in the database when that field is changed. When you audit too many fields at once, it can impact performance when saving the audited record. The maximum number of fields that can be audited for a record type is shown in the Audit Field Setup page for each record type, but the value cannot be changed in that page.
Audit Expiry (Days)	This field determines the length of time that the audit trail records for record types are retained in Oracle CRM On Demand before they are automatically purged. The retention period is specified in days, and the default value is 90. If your user role has the Administer Field Audit privilege, then you can change this value. The lowest number that you can enter is 1, and the highest is 366. A value of 0 (zero) specifies that the audit trail records are never purged. However, you cannot set the value to zero. If you want the audit trail records to be retained indefinitely, then you must contact Oracle CRM On Demand Customer Care and ask them to set this field to zero. **NOTE:** The audit trail for a record type can track the creation, deletion, and restoration of records, as well as updates to specified fields on existing records. For information about setting up the audit trail for record types, see Customising the Audit Trail (on page 206).

Field	Description
Related Information Format	Select the format for related information sections on the record Detail pages. The related information sections can appear as lists or as tabs that users can click to view the lists. You can also specify a setting for the Related Information Format option for each role. Users whose role has the Personalise Related Information Display Format privilege can also set the Related Information Format option in their personal profile. If the Related Information Format field in a user's personal profile is blank, then the setting for the user's role is used; and if the Related Information Format field on the user's role is blank, then the setting for the company is used.
Global Search Method	Select which search method you want to make available to your users in the Search section in the Action bar and in the Lookup windows: ■ **Targeted Search.** A targeted search searches specified fields to find matches. In a targeted search, users can enter values in several fields. The search returns only those records where a match is found for each of the values the user entered. The search layouts that are assigned to user roles for the record types determine which fields users can search. Targeted search is enabled by default in Oracle CRM On Demand. For more information about targeted search, see About Targeted Search. ■ **Keyword Search.** A keyword search searches default fields that are specific to each record type. In a keyword search, users enter a text string in a single text box. The search returns all records where the text string the user entered is found in any of the searched fields. For more information about keyword search, see About Keyword Search.
Fiscal Year Start Month	This field displays the month in which your fiscal calendar begins. This field is set initially when your company is created and cannot be changed by the company administrator. This setting affects reports that measure revenue against your fiscal year. To update this field, contact Customer Care.
Fiscal Year Start Date	This field displays the date within the specified month in which your fiscal year begins. This field is set initially when your company is created and cannot be changed by the company administrator. This setting affects reports that measure revenue against your fiscal year. To update this field, contact Customer Care.

Field	Description
Fiscal Calendar Type	This field displays the type of fiscal year calendar you use. You can select from the following values: Calendar Quarters, 4-4-5, 5-4-4, Custom Fiscal Calendar. This setting affects time-based analyses, business plans, and forecasts. The company administrator cannot change this field. To update this field, contact Customer Care.
Product Probability Averaging Enabled	Determines how the opportunity probability is updated when the user clicks the Update Opportunity Totals button: ■ If selected, the opportunity probability is calculated based on the weighted average of probability for each of the linked products: Opportunity Probability = SUM(Product Expected Revenue)/SUM(Product Revenue) ■ If deselected, the probability is not updated as part of the action. **NOTE:** The Update Opportunity Totals button is located on the Opportunity Detail page, in the title bar in the Products related information section.
Enable Save & Add Product	If this setting is selected and a user creates a new Opportunity record, the Save & Add Product button is displayed in the Opportunity page header instead of the Save button. If this setting is deselected and a user creates a new Opportunity record, the Save & Add Product button is not displayed in the Opportunity page header, only the Save button is available.
Enable Opportunity Revenue Split	Select this option to enable the splitting of opportunity revenue among team members. When this check box is selected, the Refresh Totals and Spread Split buttons are displayed on the Opportunity Team Edit Users page, allowing revenue to be split among team members. The Opportunity Revenue Forecast and My Opportunities page display opportunities where the user is a Team Member with a greater than 0 split revenue. When this check box is deselected, the Refresh Totals and Spread Split buttons are not displayed on the Opportunity Team Edit Users page. The Opportunity Revenue Forecast and My Opportunities page display opportunities where the user is an Opportunity Owner.

Field	Description
Head-up Display	If the head-up display functionality is turned on, and if the Support Head-up Display Settings check box is selected on your user's theme, then links to the related information sections of the page (such as linked records sections) are available in the head-up display at the bottom of your browser window. Users can also remove the head-up display completely from Detail pages, by turning off the functionality in their personal profiles. For more information on the Head-up Display, see Oracle CRM On Demand Page-by-Page Overview. **NOTE:** If a user's theme supports the head-up functionality, then the head-up display can be turned on or off at company level, and by each individual user. Also, a user's personal setting overrides the company setting. However, you can remove the head-up display completely by deselecting the Support Head-up Display Settings check box on a user's theme. The colours in the head-up display are determined by the theme you are using. For more information about choosing a theme, see Setting Your Theme.
Enable Shared Addresses	Select this option to turn on sharing of the top-level address records in account, contact, dealer, and partner records. If this option is deselected, then only unshared address functionality is available in account, contact, dealer, and partner records. For more information on shared addresses, see Addresses. **NOTE:** If shared addresses are turned on, then review the information in Considerations When Turning Off Shared Addresses (on page 98) and complete the procedure in Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses (on page 99) before you turn off shared addresses. Shared addresses are not compatible with pre-packaged Oracle product integrations such as an Oracle Process Integration Pack (PIP). If you are using a PIP, such as Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite PIP, do not select the Enable Shared Addresses setting.
Validate Shared Addresses	Select this option to validate shared addresses in a company. If this option is selected, then users can select shared addresses to add to the account, contact, dealer, or partner records. Non-validated addresses are filtered from account, contact, dealer and partner records, and the New address button is disabled in these records. If Validate Shared Addresses is deselected, then all addresses are available on account, contact, dealer or partner records (that is, no filtering takes place and the New address button is enabled in these records for users with the necessary privileges). For more information on validating addresses, see Marking Shared Addresses as Validated.

Field	Description
Enable Enhanced View for Tabs	Select this check box to enable enhanced functionality, for example, sorting and filtering in the related information sections on record Detail pages where the related information sections appear as tabs. For more information about the actions that users can perform when this check box is selected, see About the Enhanced View for Related Information Tabs. The Enable Enhanced View for Tabs check box is deselected by default.
Enable Classic Theme Paging for Tabs	Select this check box to allow users to scroll through the related information tabs on record Detail pages one set of tabs at a time rather than scrolling through the tabs one at a time, which is the default behaviour. This setting applies only for classic themes. The Enable Classic Theme Paging for Tabs check box is deselected by default.
Order Usage	Select how users work with orders and order items in Oracle CRM On Demand. If you select the CRM On Demand Order Management value, then users can use order management in Oracle CRM On Demand Life Sciences Edition. If you select the Ebiz PIP Integration value, then users can use the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution. Ebiz PIP Integration is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution, and therefore this field is not available to Oracle CRM On Demand Order Management. For more information on Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, contact Customer Care. Users require the Enable Order Access privilege in their role to use the order functionality for either of these purposes. For more information on choosing the order management type, see About EBIZ PIP Integration and Oracle CRM On Demand Order Management.

Field	Description

Record-Type Lists in Lookup Windows	Select how you can search for records in Lookup windows:
	■ **Enabled.** For this setting, the following happens:
	  ■ A set of predefined lists that users can use to restrict their searches is available in the *record type* List field in Lookup windows for top-level record types, where *record type* is the name of the type of record that the user is searching for.
	  ■ The Show Context-Sensitive List as Lookup Window Default check box is available in the Search Layout Wizard. The check box enables you to specify that any available context-sensitive lists appear before the other lists in the *record type* List field in Lookup windows. The first list in the set of lists in the *record type* List field is active when the Lookup window opens.
	■ **Mixed:** For this setting, the following happens:
	  ■ The *record type* List field is available in the Lookup windows that display *record type* List fields, and the initial search for a record of a given record type is performed on all records of that record type that the user can access.
	■ **Disabled:** For this setting, the following happens:
	  ■ The *record type* List field is not available in any Lookup windows, and the initial search for a record of a given record type is performed on all records of that record type that the user can access.
	NOTE: If you select Disabled in the Record-Type Lists in Lookup Windows menu on the company profile after you set up the search layouts, then the Show Context-Sensitive List as Lookup Window Default check box is no longer available in the Search Layout Wizard. Also, the context-sensitive lists are not available in Lookup windows, and the initial search for a record of a given record type in a Lookup window is performed on all records of that record type that the user can access, regardless of whether the Show Context-Sensitive Lists as Lookup Window Default option was previously selected. However, Oracle CRM On Demand stores the setting for the Show Context-Sensitive List as Lookup Window Default check box for each search layout. If you later select Enabled or Mixed in the Record-Type Lists in Lookup Windows menu on the company profile again, then the setting for the Show Context-Sensitive List as Lookup Window Default check box for each search layout is restored and becomes effective again.

Enable Province Picklist for Canadian Addresses	Select this option to display a list of values in Province field when using the Canada address template. By default, this option is

Field	Description
	deselected.
Enable Personalisation of Individual Dynamic Page Layouts	This check box is deselected by default and determines how users can personalise the layout of related information sections on Detail pages where dynamic layouts are used, as follows: ■ When the check box is deselected, a user can create only one personalised layout of the related information sections for a record type. After a user personalises the layout of the related information sections on the Detail page for a record type, the user sees the same set of related information sections on the Detail page of all records of that type regardless of the value that is selected in the picklist field that determines the dynamic rendering of the page layout. ■ When the check box is selected, a user can create a personalised layout of the related information sections for each value in the picklist field that determines the dynamic rendering of the page layout. **NOTE:** To personalise related information layouts, users must have the Personalise Detail Page - Related Information privilege in their role. For information about what happens if you change the setting in this check box, see How Personalised Related Information Layouts Interact with Page Layouts for Roles (on page 217). **NOTE:** The Enable Personalisation of Individual Dynamic Page Layouts setting applies only to the personalisation of related information layouts. It does not apply to the personalisation of field layouts for record pages. Users who have the Personalise Detail Page - Fields privilege can personalise their field layouts for individual dynamic page layouts even if the Enable Personalisation of Individual Dynamic Page Layouts check box is not selected. For more information about personalising field layouts, see Personalising Field Layouts.

Field	Description
Enable Language Translation Support for Web Applets	Select this check box if you want to enable the functionality that allows you to enter translated names for custom Web applets and for the applets that display custom reports on record-type homepages and on My Homepage. For more information, see Translating Web Applet and Custom Report Names (on page 191). The Enable Language Translation Support for Web Applets check box is deselected by default. **NOTE:** The Enable Language Translation Support for Web Applets check box applies only to custom Web applets and the applets that display custom reports on record-type homepages and on My Homepage. It does not enable or disable the functionality that allows you to enter translated names for other elements in Oracle CRM On Demand, such as field names, role names, access profile names, and so on.
Enable Language Translation Support for Workflow Cancel Save Message	Select this check box to enable the functionality that allows you to enter translated versions of the custom error messages that are returned to users or Web services if the condition on a workflow rule is not met and the Cancel Save check box is selected for the rule. For information about entering translated versions of the custom error messages, see Cancelling Workflow Save Operations (on page 455). The Enable Language Translation Support for Workflow Cancel Save Message check box is deselected by default. **NOTE:** If workflow rules with custom error messages already exist when you select this check box, then the custom messages for those rules continue to appear in the default company language and in the default font for all users, regardless of the user's language, until you enter translated versions of the message for the existing rules.
Exclude Vehicle/Asset Records from Portfolio Accounts	If this setting is selected, then vehicle and asset records are excluded from all Portfolio Account listings. Before Release 29, vehicle and asset records were included in Portfolio Account listings. From Release 29, if the check box is selected, only records with a value of Portfolio in the Asset Type field are included in listings. If the check box is deselected, vehicle and asset records are included in all Portfolio Account listings. This check box is deselected by default. From Release 33, if the check box is selected, then only records with a value of Portfolio in the Asset Type field are included in reports that use the Portfolio-related subject areas.

Field	Description
Enable Automatic Update of Opportunity Totals	The Enable Automatic Update of Opportunity Totals check box is deselected by default. The behaviour of this setting is as follows: If this check box is selected, then the revenue and expected revenue on an opportunity are updated automatically when any of the following events occur: ■ A product is added to the opportunity through any channel. ■ A product is removed from the opportunity through any channel. ■ The details of a product that is linked to the opportunity are updated through any channel. If this check box is not selected, then the revenue and expected revenue on an opportunity are not updated automatically when a product is added to or removed from the opportunity, or the details of a product that is linked to the opportunity are updated. To update the revenue on the opportunity after any such change, a user must click the Update Opportunity Totals button in the title bar of the Opportunity Product Revenues section in the Opportunity Detail page. **NOTE:** If the Enable Automatic Update of Opportunity Totals check box is selected on the company profile, then the Update Opportunity Totals button does not appear in the title bar of the Opportunity Product Revenues section in the Opportunity Detail page.
Allow Unicode Characters in Email Fields	If this check box is selected, then you can use most Unicode (UTF-8) characters in the address in the Email field on the Contact and Lead record types only, in both the local part of the address and the domain name. You can update the Email field in the user interface by using any of the following utilities: ■ Import Assistant ■ Oracle Data Loader On Demand ■ Web services ■ Update Values action on a workflow **NOTE:** For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses.

Field	Description
Freeze List Column Header	This picklist determines how users view column headers for lists and search results in Oracle CRM On Demand. You can select the following values: ■ **On.** When users scroll down a list of records, and the column header row reaches the top of the browser window, the column labels are always visible. ■ **Off.** When users scroll down a list of records and the column header row reaches the top of the browser window, the column labels are no longer visible. This functionality can be turned on or off at company level and at user level. The setting at user level overrides the setting for the company. The default value for this setting is Off.
Export Request Expiry Days	This field determines the length of time that export request records are retained in Oracle CRM On Demand before they are automatically purged. The retention period is specified in days. The default value is 60, but you can change this value. The minimum retention period that you can specify is one day. If you want the export request records to be retained indefinitely, then set the value to 0 (zero). **NOTE:** Export request records are not included in the calculation of your company's record allotment usage. The retention period applies to export requests that are submitted through List pages, as well as export requests that are submitted through the Data Export Assistant.

Field	Description
Export Request Attachment Expiry Days	This field specifies the number of days that the attachments containing the output from export requests are retained in Oracle CRM On Demand before they are automatically purged. The default value is 7, but you can change this value. The valid values are 1 through 366. The retention period applies to attachments for export requests that are submitted through List pages, as well as attachments for export requests that are submitted through the Data Export Assistant. **NOTE:** Users who have the Delete Export Request Attachments privilege in their role can manually delete an export request attachment before it is purged, regardless of the value that is set in this field. After a user deletes an export request attachment, the attachment cannot be retrieved. If you enter a value that is greater than 7 in this field, then the export request attachments that are retained are included in the calculation of the amount of storage used by your company, and after the file allotment limit is reached, export requests will fail. If the value in this field is less than or equal to 7, then the export request attachments are not included in the calculation of the amount of storage used by your company, and export requests will not fail as a result of the file allotment being reached. **NOTE:** After an export request is deleted, it is not possible to access the attachment for the request. Therefore, it is recommended that you do not enter a value in this field that is greater than the value in the Export Request Expiry Days field, unless that field is set to 0 (zero).

Field	Description
Store Email in Lower Case	The Store Email in Lower Case check box is selected by default. The behaviour of this setting is as follows: ■ If this check box is selected, then any uppercase characters in email addresses are stored in lowercase. ■ If this check box is deselected, then any uppercase characters in email addresses are stored in uppercase. **NOTE:** Lowercase characters in email addresses are always stored in lowercase. This setting applies to all email addresses that are added to Oracle CRM On Demand, regardless of the channel through which the addresses are added. **NOTE:** If your company saved email addresses in mixed case in the past, and if the Store Email in Lower Case check box is selected, then errors can occur when you attempt to use Web services requests or REST API requests on records such as user and contact records where the email addresses are in mixed case. If such issues arise, and if your company wants to store all email addresses in lowercase, then you must update the email addresses that are currently stored in mixed case and change them to lowercase. To edit the email addresses, you must first deselect the Store Email in Lower Case check box. After you finish editing the email addresses, select the Store Email in Lower Case check box again.

Configuring Company Work Week and Calendar Settings

The following table describes how to set up the Company Work Week and Calendar Settings section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday	Select a check box for each business day in your calendar work week. You must select at least one check box.

Field	Description
Display Events in Calendar	When this setting is selected, Oracle CRM On Demand automatically creates an associated appointment record for every event record created. The users with access to the Event record type can view their event's associated appointments in the Oracle CRM On Demand calendar. Updates to the events or appointments are kept synchronised. For more information about event and appointment synchronisation, see About Event and Appointment Synchronisation. If this setting is never selected, then only appointments that have not been automatically created when an event was created are displayed in the Calendar section and Oracle CRM On Demand does not automatically create an associated appointment for any new events. However, if your administrator selects this setting for a period of time and then chooses to deselect this setting, then any existing automatically-created appointments will remain. When an event is updated, Oracle CRM On Demand continues to synchronise with the event's associated appointment. If the event is deleted, then the appointment is also deleted. **NOTE:** If this setting is enabled, then an additional event appointment record is created in the database for each event record created. This impacts performance when importing events due to the additional records created. Additionally, if this setting is enabled, then an additional event team record is created in the database for each user added to the event appointment. This impacts performance when importing appointment users (when the import file has event appointments) due to the additional records created.
Calendar Week Starts On	This field displays the day that is shown by default as the first day of the week in the calendar views for all users and in the date selectors where users select values for date fields in Oracle CRM On Demand. By default, Sunday is selected. You can select a different start day for the week. Users can also override the company setting for the start day of the week by selecting a different day in their calendar settings.
Business Hours Start Time	Enter a time at which your business day starts. The time format can vary depending on your country's locale.
Business Hours End Time	Enter a time at which your business day ends. The time format can vary depending on your country's locale.

Field	Description
Activity Notification	This setting determines whether users can receive activity notifications. It can have the following values: ■ **None.** Users do not receive notifications unless they override this setting in the Default Calendar Settings page. This is the default setting. ■ **Email.** Users receive notifications by email unless they override this setting in the Default Calendar Settings page. ■ **Pop-up Reminder:** Users receive notifications in a pop-up window unless they override this setting in the Default Calendar Settings page. ■ **Email and Pop-up Reminder:** Users receive notifications by email and in a pop-up window unless they override this setting in the Default Calendar Settings page. Users navigate to the Default Calendar Settings page by clicking My Set-up, Calendar Settings, and then Default Calendar view.

Configuring Lead Settings

The following table describes how to set up the Lead Settings section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Convert Only Editable Related Objects	If you select this check box, then users can convert leads to other record types such as accounts, contacts, deal registrations, or opportunities, even if the user performing the conversion does not have edit access to all activities and custom object records required for the conversion. However, only the activities and custom object records to which the user has edit access are linked to the converted lead record. For more information on the settings required for lead conversion, see Access Profile and Role Settings for Converting Leads. If you do not select this check box, then the user performing the conversion must have edit access to all activities linked to the lead and all custom object records selected for the conversion. Otherwise, the lead conversion will not succeed. This is the default setting.
Enable Owner Full Name, Rating and Sales Person are Required to Qualify a Lead	If you select this check box, then the Owner Full Name, Rating, and Sales Person fields are required in the Lead record when qualifying the lead. This is the default setting. If you do not select this check box, then these fields are not required for qualifying a lead.
Auto-Update Sales Person Field	If you select this check box, then Oracle CRM On Demand automatically

Field	Description
When Associating Account on Lead Record	updates the Sales Person field in a lead when an account that is associated with the lead is updated, either through the user interface, the import tool, workflows, or through Web services. This is the default setting. If you do not select this check box, Oracle CRM On Demand does not update the Sales Person field. **NOTE**: If a user clicks the Convert button on a Lead Detail page to associate a lead to an existing account, then Oracle CRM On Demand does not update the Sales Person field.

Configuring Company Theme Settings

The following table describes how to set up the Company Theme Setting section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Default Theme	The theme determines the look-and-feel of Oracle CRM On Demand. The default theme is automatically used when you sign in to Oracle CRM On Demand using a desktop or laptop computer. When Oracle CRM On Demand is first set up for a new company, the default theme is Oracle. To change the theme, click the Theme Name list, and then select the theme that you want for the company. Users can also override this setting when they edit their personal preferences. Themes have no effect on how Oracle CRM On Demand behaves. Company administrators can create custom themes in Oracle CRM On Demand. Contact your company administrator if you want to submit your own themes to use in Oracle CRM On Demand.
Tablet Theme	This setting determines which theme is automatically used when a user 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. This setting is optional.

Configuring Company Data Visibility Settings

The following table describes how to set up the Data Visibility Settings section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Manager Visibility Enabled	When a manager views a list of records that is set up to search the *All*

Field	Description
	records I can see record set, such as the All Accounts list, Oracle CRM On Demand displays the list of records as follows: ■ If the Manager Visibility Enabled option is selected, then the list includes the records to which the manager's subordinates have access. ■ If the Manager Visibility Enabled option is not selected, then the list does not include the records to which the manager's subordinates have access, unless the Can Read All Records setting on the manager's role is selected for the relevant record type. When a manager selects the *All records I can see* option in an advanced search, Oracle CRM On Demand searches the set of records as follows: ■ If the Manager Visibility Enabled option is selected, then the set of records that Oracle CRM On Demand searches includes the records to which the manager's subordinates have access. ■ If the Manager Visibility Enabled option is not selected, then the set of records that Oracle CRM On Demand searches does not include the records to which the manager's subordinates have access, unless the Can Read All Records setting on the manager's role is selected for the relevant record type. A user's manager is specified in either the Reports To field or the Reports To (Alias) field on the User Detail page, depending on which of these fields is displayed on the page. **NOTE:** Deselecting the Manager Visibility Enabled option does not result in managers being unable to access the records that are owned by their subordinates. Managers always have access to the records that are owned by their subordinates, regardless of the setting of this option.
Enable Parent Team Inheritance for Contact	Select this check box to enable contact teams to automatically inherit account team members when contacts are related to accounts. This check box is deselected by default for new companies. **NOTE:** After you change the setting in this check box, users must sign out of Oracle CRM On Demand and then sign in again to see the new behaviour of the team inheritance functionality. For more information about team inheritance, see About Access Propagation Through Team Inheritance (on page 321).
Enable Parent Team Inheritance for Opportunity	Select this check box to enable opportunity teams to automatically inherit account team members when opportunities are related to accounts. This check box is deselected by default for new companies. **NOTE:** After you change the setting in this check box, users must sign out of Oracle CRM On Demand and then sign in again to see the new behaviour of the team inheritance functionality. For more information about team inheritance, see About Access Propagation Through Team Inheritance (on page 321).

Field	Description
Default Group Assignment	Select this option to allow group members to share ownership of accounts, activities, contacts, households, opportunities, and portfolios. For more information, see Group Management (on page 383).
Enable Books	Controls whether the Book selector displays custom books. If this check box is not enabled, the Book selector displays only user books and books for delegates, if delegates exist. **CAUTION:** Do not select the Enable Books option until you have created your book hierarchy. You cannot deselect this option after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.
Display Book Selector	Enables or disables the Book selector, which you can use to refine searches for records of a particular user, delegate, or custom books.
Enable Merge of Duplicate Record's Books	This setting applies only if your company uses the book functionality in Oracle CRM On Demand. For information about the book functionality, see Book Management (on page 338). When users merge records, the books that are associated with the primary record are always retained, but any books that are associated only with the duplicate record are not automatically associated with the primary record. The Enable Merge of Duplicate Record's Books check box determines whether the user who merges the records can choose to associate the duplicate record's books with the primary record, as follows: ■ If the check box is selected, then Oracle CRM On Demand prompts the user to specify whether the books that are associated with the duplicate record are to be associated with the primary record. ■ If the check box is deselected, then the user cannot specify that the books that are associated with the duplicate record are to be associated with the primary record. The check box is deselected by default. For more information about merging duplicate records in Oracle CRM On Demand, see Merging Records.

Field	Description
Display Parent Book Hierarchy in Book Selector	This setting applies only if your company uses the book functionality in Oracle CRM On Demand. For information about the book functionality, see Book Management (on page 338). The Book Selector page allows users to view only their associated books and subbooks. However, by allowing users to view the entire book hierarchy, users have context to specific books within the company. The Display Parent Book Hierarchy in Book Selector check box determines how books and hierarchies are displayed in the Book Selector as follows: ■ If the check box is deselected, then the Book Selector displays only books and subbooks where the user is a member. ■ If the check box is selected, then the Book Selector displays the books and subbooks where the user is a member, and all upper nodes in the book hierarchy. If the Can Read All Records setting for books is selected for the user's role, then the user can expand and view all nodes in the book hierarchy. The names of the books of which the user is a member and its subbooks are displayed in black. The upper nodes of which the user is not a member are displayed in red. **NOTE:** The setting affects only the Book Selector in pages where a record search or filter is applied, for example, the Action Bar Search, Advanced Search, List Management, Lookup windows, Reports, and Dashboards.

Configuring Integration Settings

The following table describes how to set up the Integrations Settings section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Integration Event Enabled	If you are a new customer, the integration event functionality is automatically enabled. However, if you are an existing customer, the Oracle CRM On Demand integration event functionality must be configured by Customer Care and by your company administrator. Contact Customer Care to request support for Integration Event Administration and to specify the maximum total size of the integration event queues you require.
Web Services R16 Compatibility Mode	Controls whether Web services requests containing the Username and Password tokens are processed as stateless requests or as stateful requests as in Oracle CRM On Demand Release 16 and earlier. This check box is deselected by default for all new companies.
Enable Workflow	If your company has been set up to allow workflow, this setting is displayed. This setting can be activated once you have created the workflow conditions that you want to deploy.
Include Weblink URL in Export	This setting determines the default value of the Include Weblink URL in

Field	Description
Files	Export Files check box in the Export Assistant or in the Export List page. The behaviour of this setting is as follows: ■ If this check box is selected, then the Include Weblink URL in Export Files check box is selected by default in the Export Assistant or on the Export List page. When performing an export, this value specifies that URLs are included in the exported CSV file. ■ If this check box is not selected, then the Include Weblink URL in Export Files check box is not selected by default in the Export Assistant or on the Export List page. When performing an export, this value specifies that URLs are excluded in the exported CSV file. **NOTE:** When performing each export, the user can choose to select or deselect the Include Weblink URL in Export Files check box.

Configuring Company Security Settings

The following table describes how to set up the Company Security Settings section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Company Idle Timeout (minutes)	This is the time allowed in minutes before a user's session ends because of inactivity. If the value for this field is blank, the interactive session timeout setting is determined by the System Default Idle Timeout value. The default value for the system default idle timeout value is usually 60 minutes. You can view the current System Default Idle Timeout setting on the Company Profile page. This value is visible when you edit the Company Profile page. It is recommended that you enter a value between 10 minutes and 90 minutes. The Company Idle Timeout (minutes) setting can also determine the time that is allowed before a non-interactive session, such as a Web services session, ends due to inactivity, as follows: ■ If the Company Idle Timeout (minutes) field is set to 10 minutes or less, then the setting applies to non-interactive sessions as well as interactive sessions. ■ If the Company Idle Timeout (minutes) field is set to any value that is more than 10 minutes, then the setting does not determine the idle timeout interval for non-interactive sessions. In this case, the idle timeout interval for non-interactive sessions is 10 minutes by default.

Field	Description
	■ If the Company Idle Timeout (minutes) field is left blank, then the setting does not determine the idle timeout interval for non-interactive sessions. In this case, the idle timeout interval for non-interactive sessions is 10 minutes by default, and the System Default Idle Timeout value determines the idle timeout interval for interactive sessions. **NOTE:** From Release 33, if any Analytics Answers interactions invoke a server call, then the idle timeout interval timer is reset.
Company Idle Timeout Warning (minutes)	The time in minutes before a warning message appears to the user, prior to the user's session expiring. If the user clicks OK on this warning message, then the idle timeout interval timer is reset. However, if the user does not click OK, then the user's session times out after the specified idle timeout interval. **NOTE:** This warning message is not displayed in Analytics Answers. The value for the Company Idle Timeout Warning (minutes) field must be between 1 and the value indicated in the Company Idle Timeout (minutes) field. If you enter 0 as a value, then a warning message is not displayed. **NOTE:** The page mask that appears when the warning message is displayed does not provide a security mechanism.

Field	Description
Authentication Type	Displays which authentication types are allowed for your company. This value can only be assigned by Customer Care. Your company administrator cannot change this value. The following values are possible: ■ User ID/Password Only - All users must sign in using their Oracle CRM On Demand User ID and password. ■ Single Sign-On Only - All users must sign in using your company's single sign-on mechanism. Oracle CRM On Demand User IDs and passwords are not accepted. ■ User ID/PWD or Single Sign-On - Either User ID and password for Oracle CRM On Demand, or single sign-on can be used to sign in to Oracle CRM On Demand. **NOTE:** If the User ID/PWD or Single Sign-On value is selected, then your company's policies for passwords in Oracle CRM On Demand continue to be enforced. So, when a user's password in Oracle CRM On Demand expires, Oracle CRM On Demand prompts the user to change the password, even if the user signs in using Single Sign-On. All other policies for passwords in Oracle CRM On Demand are also enforced, such as the minimum length of the password, the required complexity of the password, and so on. Oracle CRM On Demand does not manage the passwords that are used for Single Sign-On. Authentication type can be set for each user by the company administrator on the User Profile page. If the user's value is empty, then the company-level setting is used for that user.
External Identifier for Single Sign-On	Unique company identifier assigned by Customer Care when Single Sign-On is configured for the company. This value cannot be changed by the company administrator, although External Identifiers may be set for each user on the User Profile page.
Sign In Page for UserID/Pwd Authentications	The URL to a company-specific custom Sign In page, which replaces the default Oracle CRM On Demand Sign In page. Typically, the page is hosted on a company Web server. The URL must be fully qualified - (the URL must begin with http:// or https://). This page is displayed after a user signs out or the user's session ends because of inactivity. It is the company's responsibility to direct their users to sign in initially using this page, rather than the default Oracle CRM On Demand page.
Sign In Page for SSO Authentications	The URL to a company-specific custom Sign In page, which is displayed after a user signs out, or the user's session ends due to inactivity if the user signed in to Oracle CRM On Demand originally, using Single Sign-On. Typically, the page is hosted on a company Web server - for example the company's Single Sign-On portal. The URL must be fully qualified (begin with http:// or https://).

Field	Description
	It is the company's responsibility to direct users to sign in initially, using their SSO Sign In page, rather than the default Oracle CRM On Demand page. If a user who has signed in using SSO signs out and this setting is blank, a generic page is displayed with the message "You have been signed out."
IP Address Restrictions Enabled	See Restricting Use to IP Addresses (on page 58).
Cross-Site Request Forgery Protection Enabled	Enables a feature that prevents cross-site request forgery attacks. When this check box is selected, users who create customised code that interacts with Oracle CRM On Demand might require a security token to be included as a hidden parameter in their code. For more information about cross-site request forgery protection, see About Cross-Site Request Forgery Protection (on page 56). This check box is selected by default when your company is set up to use Oracle CRM On Demand, and you cannot change the setting.
Enable IFRAME embedding	For security reasons, this check box is deselected by default and must be selected only when required. By selecting this check box, you allow users to embed Oracle CRM On Demand pages in an iFRAME on another site's Web page. If users try to embed Oracle CRM On Demand in an iFRAME on another site's Web page, and this check box is deselected, the Oracle CRM On Demand page expands so that it becomes the parent page. You must select this setting if you want to use the Oracle CRM On Demand Reports widget. This setting does not affect other Oracle CRM On Demand widgets that you embed in desktop applications.
How to handle pages that may contain Cross Site Scripting (XSS)	Controls the behaviour of the cross-site scripting (XSS) protection available in some Web browsers to prevent reflected XSS attacks. You use this setting to determine how your Web browser handles pages that contain XSS. The following values are possible: ■ **Block.** If XSS is detected by the Web browser, then the Web page is not displayed. This is the default and the recommended value. ■ **Correct.** If XSS is detected by the Web browser, then Oracle CRM On Demand blocks the attack by making the smallest modification possible to the returned Web page. ■ **Do Nothing.** This setting provides no XSS protection. The Web browser will not try to detect XSS, or will ignore any detection of XSS, in the Web page. It is recommended that you do not use this setting. ■ **Browser Default.** This setting uses the Web browser's default XSS protection level, which might be configurable, and the level of XSS protection might vary from one vendor to another.

Field	Description
Convert URL Text Values to Links	By selecting this check box, address fields and text field values with the field type of Text (Short) or Text (Long) that start with http:// or https:// are automatically converted to Web links. In addition, any URL field values on the Attachment Detail page that start with http:// or https:// are also automatically converted to Web links. For security reasons, this check box is deselected by default and must be selected only when required.

Configuring Analytics Visibility Settings

The following table describes how to set up the Analytics Visibility Settings section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Reporting Subject Areas	Use this picklist to set the visibility for users who want to view real-time reports in Analytics. These reports provide real-time analyses of data. You can select one of the following values: ■ **Manager Visibility.** Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.) ■ **Team Visibility.** Allows users to view their own data, and data shared with them by their Account and Opportunity teams. This company-wide setting applies unless users set a value for the Reporting Subject Areas setting in their Personal Detail page. For more information on reports, see Analytics, particularly the About Visibility to Records in Analytics topic.
Historical Subject Areas	Use this picklist to set the visibility for users who want to view historical reports in Analytics. These reports provide historical or trend analyses or contain more complex calculations than those found in real-time reports. You can select one of the following values: ■ **Manager Visibility.** Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.) ■ **Team Visibility.** Allows users to view their own data, and data shared with them by the Account and Opportunity teams. ■ **Full Visibility.** This setting combines the views of Manager and Team Visibility. This company-wide setting applies unless users set a value for the Historical Subject Areas setting in their personal details. For more information on reports, see Analytics, particularly the About Visibility to Records in Analytics topic.

Field	Description
Role-Based Can Read All Records	Use this picklist to specify whether you want Analytics to use the Can Read All Records setting on a record-type basis, as defined on the Record Type Access page within the Role management wizard. If the Role-Based Can Read All Records setting is enabled through either the company profile or your user profile, and if the Can Read All Records visibility setting is selected by your administrator for your user role on a given record type, then you can view all records of that record type in Analytics. See About the Role-Based Can Read All Records Setting for guidance on when and how to enable the Role-Based Can Read all Records setting. If the Role-Based Can Read All Records setting is not enabled, then Analytics uses the visibility set on the Reporting Subject Areas and Historical Subject Areas fields.

Configuring Communications Settings

The following table describes how to set up the Communication Settings section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Auto Wrap Up	If you select this setting, Oracle CRM On Demand automatically wraps up the Communication Activity when an agent ends any call or email communication, or when an agent re-assigns voicemails. The agent does not see the Wrap Up form. The activity status is set automatically to Completed and the resolution code is set to Auto Wrap Up. **NOTE:** This setting does not apply if the agent manually clicks the Wrap Up button on a Communication Activity Detail page. For example, after listening to a voicemail, the agent can click the Wrap Up button on the Voicemail Activity Detail page, to display a Wrap Up form and wrap up the Activity.
Send Email on User Profile Updates	This setting determines which Oracle CRM On Demand users receive alert emails after the Email, User ID or External Identifier for Single Sign-On fields are updated. The following values are available: ■ **All Users.** Emails are sent to all Oracle CRM On Demand users. This setting is the default, and it is the recommended setting. ■ **All Active Users.** Emails are sent only to all active Oracle CRM On Demand users. ■ **No Users.** Emails are not sent to any Oracle CRM On Demand users. This setting is recommended only in a nonproduction environment.

Configuring Additional Company Profile Settings

The following table describes how to set up the Additional Information section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Licensed Users, Active Users, Inactive Users	These numbers are read-only, they display your licensed number of users along with the current status of users.

Configuring Geocoder Settings

The following table describes how to set up the Geocoder section in the Company Profile page in Oracle CRM On Demand.

NOTE: Some additional fields might be displayed if your company has certain features turned on.

Field	Description
Enable Geocoder	This setting enables Oracle CRM On Demand to use the information in address records to find the corresponding latitude and longitude values for the address using Oracle Spatial. If Oracle CRM On Demand is successful in finding the latitude and longitude, then it populates the latitude and longitude fields in the address records with these values. This setting is deselected by default. **NOTE:** This field is read-only. Contact Oracle CRM On Demand Customer Care if you require any changes to this setting. For more information on geocoding, see About the Geocoding of Address Information.

Verifying License Statuses and Active Users

You can verify the license status and compare that to the number of active users. You need a license for each active user. (An *active user* is a user who can access the application.)

The number of licenses also determines the amount of data that the application can store for your company.

Before you begin. To perform this procedure, your role must include the Manage Company privilege.

To verify your license status and active and inactive users

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

2. In the Company Administration section, click the Company Administration link.
3. In the Company Profile section, click the Company Profile link.
4. In the Additional Information section on the Company Profile page, verify the numbers of licensed, active, and inactive users.
   - If you have active users who no longer need access to the application, you can free up licenses by deactivating them. For more information on deactivating licenses, see Deactivating Users (on page 295).
   - If you want to purchase more licenses, contact your Oracle CRM On Demand sales representative.

About Sign-in and Password Policies

Oracle CRM On Demand provides the highest levels of security for your company. Security constraints have been built in to ensure that only authorised users have access to your data.

In addition, you can enforce certain sign-in, password and authentication policies to raise the level of security within your company. For example, you can set the sign-in timeout to 15 minutes to better adhere to your corporate security policies. And if any of your users forget their password, they can receive a new one by simply answering a set of validation questions. As an added security measure, you can specify the number of hours for which an active session can last. For example, you can set up a user's active login session to last an hour. When the user reaches the active session limit and tries to perform an action within Oracle CRM On Demand, the user is forced to enter her login credentials before continuing the session.

Security Considerations

Before you set up your sign-in and password controls, you need to carefully consider your security needs. Some of the questions you should answer are:

- What type of user ID do you want to use?
- How long do you want a user's system-generated temporary password to be valid for?
- What will be the maximum number of sign-in attempts that is allowed before a user is locked out of the application?
- How long will the sign-in lockout last? How often do you want users to change their passwords?
- Do new passwords have to be different to old passwords?
- What is the minimum password length?
- How many security questions must be answered successfully by users to enable them to reset their password if they forget it?
- How many security questions must be answered correctly before the application automatically resets a user's password?
- Do you want to allow users to change their user IDs or email addresses?
- How long do you want a user's active session to last for?

When you have defined your sign-in and password policies, you can implement them in the Company Administration pages in the application.

Password Setting Changes

If you make changes to the password settings, the system does not enforce the changes until the current passwords expire. For example, if you change the minimum password length from seven characters to 10 and a user already has a seven-character password, the user can use the seven-character password until it expires. At that time, the user will have to create a new password of at least 10 characters.

It is best to set the internal policy and select the settings before adding new users to the system. If, however, you must make a change to your security policy immediately, you have the ability to reset all user passwords. This action generates an email to all the users in your company providing them with a new temporary password. You must have the Manage Company - Reset All Passwords privilege to do this.

What Happens When Users Forget Their Password?

Users who have the Reset Personal Password privilege in their role can submit a request to reset their password if they forget it. They can use the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page. You must define the minimum number of security questions and answers that users must provide to have their password reset. When this feature is set up, users can reset their own Oracle CRM On Demand password without the company administrator intervening.

Defining Your Company's Password Controls

You can define the password policy for Oracle CRM On Demand. For example, you can set the password policy to conform to your company's protocols about how long passwords should be and how often they should expire.

To define your company password controls

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Profile section, click the Sign In and Password Control link.
4. On the Company Sign In and Password Control page, fill in the information and then save the settings.

   The following table describes the settings.

   NOTE: To reset their password, users must have the Reset Personal Password privilege in their user role. To reset their password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page, users must also have security questions and answers set up in the system.

Setting	Possible Values	Usage
Sign-in Policy Information		
Company Sign In ID	Text box	Is a unique identifier for your company. When creating new users, this identifier will be the first portion of the User Sign In ID (Company Sign-in

		ID) for the user. When new users are created and the Default User ID Type is Company Sign-in ID, the Company Domain part of the user ID is pre-populated with this value. This setting can also be accessed from the Company Profile page.
Maximum Number of Current Password Attempts	Number between 1 and 3	The number of times that a user can try to enter the current password. If the user is entering the current password at the login screen when the number of attempts is reached, then the user is locked out from Oracle CRM On Demand. The Sign In Lockout Duration field value determines how many attempts are allowed. However, if the user is entering the current password from within Oracle CRM On Demand, or if the user is updating the password, and if the maximum number of current password attempts is reached, then the user's session is terminated. The user is not locked out from Oracle CRM On Demand, and the maximum number of current password attempts is still available at the login screen before Oracle CRM On Demand applies the value set in the Sign In Lockout Duration field. The default value for existing and new customers is 3.
Sign In Lockout Duration	15, 30, 60 minutes or Forever	The length of time that the user's account is locked.
Maximum Session Duration in Hours	0-9999 hours	The length of time that a user's active session can last before the user is asked to re-enter his login credentials. This field accepts positive integers from zero (0)

		through 9999. To view your default value for this setting, go to the Sign In and Password Policies page in Company Administration . When using Oracle CRM On Demand, you must re-enter your login credentials when the active session reaches its maximum duration. When using Web services and the active session times out, the Web Services client must reauthenticate to continue using Web services.
Password Control Information		
Expire User Passwords In	30 days, 60 days, 90 days, 180 days, One Year, Never expires	The length of time that a user's password is valid. After this period has elapsed, the user is forced to change the password. **NOTE:** If the Expire User Passwords In setting on your role is blank, then the setting for the company is used.
Days Before Password Expiry Warning	This value can be blank, or it can be a number greater than 0 and less than the number of days specified by the option selected in the Expire User Passwords In field. If you select the One Year option in the Expire User Passwords In field, then the value that you enter in the Days Before Password Expiry Warning field can be a number between 1 and 364, or you can leave the field blank.	This setting indicates how many days prior to a user's password expiring Oracle CRM On Demand sends a notification email to the user. It is recommended that you enter a value of no less than 2, and you might want to specify a greater number of days to allow adequate time for the user to update the password. If you enter no value in this field, then no notification email is sent to the user. **NOTE:** If you select the Never expires option in the Expire User Passwords In field, then the Days Before Password Expiry Warning field is read-only.

Minimum Password Length	Number between 6 and 10	The minimum number of characters that can be used for a password.
Maximum Number of Password Changes	Number between 1 and 20	The maximum number of times that a user's password can be changed as specified in the Password Change Limit Window setting. If a user attempts to change a password more than the specified number of times, the change is not allowed. **NOTE:** Oracle CRM On Demand does not implement this password policy if your user authenticates using a Single Sign-On ID.
Password Change Limit Window	Number of days (from 1 to 7)	The period during which the Maximum Number of Password Changes setting applies.
Complexity Level of Passwords	3 or 4	The number of character classes that must be satisfied in the user passwords from the following four categories: ■ Uppercase characters (A...Z) ■ Lowercase characters (a...z) ■ Numeric characters (0, 1, 2...9) ■ Non-alphanumeric characters (!,$,#,%)

Enforce Password Policy On Logon	Check box	If the check box is selected, then a password policy check is enabled when users sign in to Oracle CRM On Demand. This policy check ensures that the user's password complies with the Minimum Password Length and Complexity Level of Passwords settings in Oracle CRM On Demand.
Number Of Last Passwords To Prevent User From Reusing	Number between 0 and 10	The number of previously used passwords that the user cannot reuse in Oracle CRM On Demand. The default value for new companies is 3. The default value for existing companies is 1 or 0 if the following conditions are met: ■ The New Password Must Be Different Than Your Old Password setting is selected. ■ The Number Of Last Passwords To Prevent User From Reusing setting is deselected.
Authentication Information		
Number Of Security Questions To Be Completed	Number between 0 and 8	This setting determines how many security questions and answers a user must set up. The user's questions and answers are stored for future use. **NOTE:** Users set up their security questions when they sign in to Oracle CRM On Demand for the first time. Users can also change their security questions at any time. For more information, see Setting Up Your Security Questions. When users reset their password from the Can't

		Access Your Account? link on the Oracle CRM On Demand sign-in page, they must answer a certain number of the security questions that they set up. **NOTE:** If a user forgets his password when this value is set to zero (0), then the user must request the administrator to reset his password. You can specify that users must set up a larger number of questions than the number they are required to answer when resetting a password. A random selection of the questions the user sets up is displayed to authenticate the user when resetting the password.
Number Of Security Questions To Be Answered	Number between 0 and 8	This setting determines the number of security questions that a user must answer when resetting a password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page. When the user submits the request to reset the password, the user receives an email, shortly afterwards, with a link to a temporary page. On the temporary page, the user must answer the number of security questions specified in this setting before the password can be reset. The value in this field must be less than or equal to the value in the Number of Security Questions to be Completed field, because the user cannot be required to answer more questions than the user has set up.

Number Of Days Temporary Sign In Is Valid	Number of days (1 to 14)	This setting determines the number of days that a temporary sign-in password is valid. An email with temporary sign-in information is typically sent when a new user is added, or when the company administrator or Customer Care resets the user's password.
Number Of Temporary Password Sign In Attempts	Number of attempts (1 to 14)	The total number of sign-in attempts allowed using a temporary sign-in password. If this value is exceeded, the user's temporary sign-in information becomes invalid and the user must have the password reset again.
Additional Information		
Allow Users To Change User ID	Check box	If the check box is selected, users who edit their User Profile can change their User ID. If the feature is not enabled, only the company administrator can change the user IDs.
Allow Users To Change Email Address	Check box	If this check box is selected, then users who edit their user profile can change their email address. If this feature is not enabled, then only the company administrator can change the email addresses.

Concurrent Session Option	Allow with Notification, Allow without Notification, and Prevent and Terminate Existing	This setting allows you to manage how Oracle CRM On Demand handles concurrent sessions while using your login credentials. The option, Allow with Notification, allows you to engage in concurrent sessions. However, Oracle CRM On Demand notifies you that another session is in progress, using the same account details. Oracle CRM On Demand also provides notification to the user on the other session. The option, Allow without Notification, allows you to engage in concurrent sessions. However, Oracle CRM On Demand does not notify either user that the other session is in progress. The option, Prevent and Terminate Existing, closes the first and existing session, leaving the second and new session in progress. Users of both sessions are notified of the actions.

About Cross-Site Request Forgery Protection

To prevent cross-site request forgery attacks, users who create customised code that contains HTTP POST requests (including Asynchronous Java Script and XML (AJAX) requests) that try to update, create, or delete data in Oracle CRM On Demand must include a security token, as a hidden parameter in their code. If the customised code does not contain the security token, or if the security token is used incorrectly, the request will fail. When the request fails, the user will see an error message indicating that the request cannot be completed, because the key is invalid or has expired, and the user must refresh the page.

The security token that users must include in their code is shown in the following table.

Parameter Component	Token Code
Name	%%%ODReqName%%%
Value	%%%ODReqValue%%%

NOTE: The token code is case sensitive, and must be exactly as shown in the table. Any error in the token code causes the request to fail.

This protection feature for cross-site request forgery is controlled by the Cross-Site Request Forgery Protection Enabled check box on the company profile. The feature is enabled by default when your company is set up to use Oracle CRM On Demand, and you cannot disable it.

Resetting All Passwords

You can reset all users' passwords (including the administrator's) at one time.

Usage example 1. When you are setting up your application, create users and set their Status to Active, but don't email their passwords to them. After the set-up is completed and the application is ready for use, reset all passwords. This action sends emails to all active users at once, notifying them of their temporary passwords and giving them access to the application.

Usage example 2. You have changed your password control policy and want all users to conform to the new policy. Reset all passwords so that the users must change their passwords when they next sign in.

Before you begin. To perform this procedure, your role must include the Manage Company - Reset All Passwords privilege. Also, each user role must include the Reset Personal Password privilege.

To reset all passwords

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Profile section, click the Company Profile link.
4. In the Company Profile title bar, click the Reset All Passwords button.

   Emails are sent to all the users, notifying them of their new temporary passwords. Users currently signed in are able to continue working but will need to enter their new temporary passwords when they next sign in.

Related Topics

See the following topics for related information:

- Resetting a User's Password (on page 288)
- Setting Up Users (on page 271)
- Defining Your Company's Password Controls (on page 49)

Activating Languages

Oracle CRM On Demand is available in many languages. All default text fields supplied with the product, such as fields and picklist values, along with online help and tutorials are shown in the available languages.

However, when you customise fields or picklist values, you must manually enter the equivalents in other languages, if you want those to appear in their translated versions. Otherwise, they appear in the original language in blue text with brackets around them, regardless of the language you selected.

Initially, the only active language is the one that was selected as the company default language when your company signed up for Oracle CRM On Demand.

To make the language choices available to your users, you must activate them.

Before you begin. To perform this procedure, your role must include the Manage Company privilege.

To activate languages

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Profile section, click the Languages link.
4. In the Active column, select the languages you want to make available to your employees.

   NOTE: The formats for displaying dates, times, and currency are determined by other settings, not the Language setting.
5. Save the record.

Restricting Use to IP Addresses

This feature allows your company to restrict access to the system to specific IP address ranges. You can use this feature to ensure that your users only access the system from specific network locations, such as your office. If this feature is enabled, your users can only sign in to the application from machines that have IP addresses within the range you specified.

NOTE: You can also specify restrictions at role level, so that users who have a certain role are restricted to specific ranges of IP addresses. For more information, see About IP Address Restrictions for Roles (on page 308).

Before you begin. Contact Customer Care so that they can enable the IP filtering for your company. After that, to perform this procedure, your role must include the Manage Company privilege.

To restrict use to IP addresses

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. Click the Security Settings link.
4. On the Security Settings page, enter the IP addresses that are acceptable for signing in.

   TIP: Review the onscreen information about the correct way to enter IP addresses.

5 Save the record.

Fiscal Calendar Administration

Fiscal calendar administration includes defining the start of the fiscal year and the corresponding end of the fiscal year for your company:

- About Fiscal Calendars (on page 59)
- Updating the Fiscal Calendar Name (on page 60)
- Defining a Custom Fiscal Calendar (on page 61)
- Managing Your Company's Lists of Periods (on page 63)

About Fiscal Calendars

Two types of fiscal calendar are available in Oracle CRM On Demand:

- **Standard Fiscal Calendar.** If your fiscal year follows a common calendar (for example, calendar quarters, 5-4-4, 4-4-5), you can use this calendar type in your company profile.
- **Custom Fiscal Calendar.** If your company follows a different calendar, such as 4-5-4, you can define a custom fiscal calendar in Oracle CRM On Demand.

If you use either a standard fiscal calendar or a custom fiscal calendar, a fiscal year is defined once for your company. Each fiscal calendar type automatically allows you to use the defined fiscal periods in Oracle CRM On Demand.

Standard Fiscal Calendars

Standard fiscal calendars are periods that follow a commonly defined calendar, such as a Gregorian calendar, and can start on any day of any month of the year. If you use a standard fiscal calendar in Oracle CRM On Demand, you select one of the following calendar types:

- Calendar Quarters
- 4-4-5 calendar model
- 5-4-4 calendar model

When using standard fiscal calendars, Oracle CRM On Demand automatically generates your fiscal periods up to the year 2040. You can view the settings for your standard fiscal calendar, but you cannot change them. However, you can change the naming format of your fiscal calendar, for more information see Updating the Fiscal Calendar Name (on page 60). If you want to change your calendar definition, contact Customer Care. Customer Care populates your fiscal calendar with data and specifies your calendar type when your company is being set up.

NOTE: Any changes made to your fiscal year definition are not reflected in Oracle CRM On Demand Reports until a full ETL (Extract, Transform, Load) is run.

To view a standard fiscal calendar definition

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Profile link.
3. In the Company Settings section, review the following fields:
   - Fiscal Year Start Month
   - Fiscal Year Start Date
   - Fiscal Calendar Type

NOTE: When changes are made to the definition of a standard fiscal calendar , Oracle CRM On Demand updates all data in reports. However, Oracle CRM On Demand updates only future data in forecasts.

Custom Fiscal Calendars

Custom fiscal calendars are available in Oracle CRM On Demand to accommodate companies that do not use standard calendar months or a common fiscal calendar. Your company administrator defines custom fiscal calendars. You must create a custom fiscal calendar record for each year for which you want to create business plans, objectives, forecasts, or time-based analyses in Oracle CRM On Demand. For more information on defining custom fiscal calendars, see Defining a Custom Fiscal Calendar (on page 61).

Updating the Fiscal Calendar Name

When Customer Care creates a standard fiscal calendar for your company, by default the fiscal calendar name is suffixed automatically with the end year for that fiscal year. For example, a fiscal calendar with a year starting in 2039 and year ending 2040 is called Fiscal Calendar 2040.

If your company requires an alternate naming convention to accommodate using external systems with Oracle CRM On Demand, you can configure the fiscal year naming format so that all standard fiscal calendar names, and fiscal period names, are suffixed with either the end year or the start year of the fiscal year.

NOTE: You can specify a calendar name while you define a custom fiscal calendar, however you cannot modify names for custom fiscal calendars once defined. Changing the name format for fiscal calendars does not impact the end or start dates for fiscal years or fiscal periods.

To update the fiscal calendar name

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
4. On the Fiscal Calendar List page, click Update Fiscal Calendar Name.

5 Select one of the following:

- **Start Year**. Fiscal calendar names and fiscal period names are suffixed with the start year for that fiscal year.
- **End Year**. Fiscal calendar names and fiscal period names are suffixed with the end year for that fiscal year.

6 Click Save.

Defining a Custom Fiscal Calendar

Your company administrator defines the fiscal calendar in Oracle CRM On Demand to conform to your company's fiscal year. Custom fiscal calendars are reflected in all reports, business plans, objectives, and user quotas.

NOTE: To configure the definition of the custom fiscal calendar, your role must include the Manage Company privilege.

To set up your company's custom fiscal calendars, you must do the following:

1 Contact Customer Care to enable the use of custom fiscal calendars for your company.

2 Define your company's fiscal calendars.

3 Verify that the custom fiscal calendar is active within your company.

CAUTION: After you enable the custom fiscal calendar option for your company, you cannot disable this option. It is recommended that company administrators do not enable custom fiscal calendars unless they fully understand the features of fiscal calendars in Oracle CRM On Demand.

Custom Fiscal Calendars and Forecasts

When using custom fiscal calendars, your company's custom fiscal calendar definition is used in the generation of forecasts. Your company administrator must define custom fiscal calendar records prior to activating forecasts. Since forecasts can span more than one quarter in duration, it is possible that a forecast could include data from multiple fiscal years. Therefore, to ensure that sufficient data is available for the forecast series to be generated, a custom fiscal calendar must be created for each year your company wants to generate forecasts. In addition, your company administrator must update your forecast definition before the new custom fiscal calendar definition can be used in forecasts. If the forecast definition is not refreshed prior to the next forecast date, your forecasts are not generated. For more information on updating forecast definitions, see Updating the Forecast Definition (on page 527).

To define a new custom fiscal calendar

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

2 In the Company Administration section, click the Company Administration link.

3 In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.

4 On the Fiscal Calendar List page, click New Fiscal Calendar.

5 From the menu, select the fiscal year that you require.

The name of the fiscal calendar is automatically populated in the Name field, for example, Fiscal Year 2009. This value is read-only.

NOTE: You can specify a calendar name while you define a custom fiscal calendar; however, you cannot modify names for custom fiscal calendars after they are defined.

6 Enter the following information:

a **Description.** Add any extra information about the custom fiscal definition. This field has a limit of 250 characters.

b **Fiscal Quarter 1.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.

c **Fiscal Quarter 2.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.

d **Fiscal Quarter 3.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.

e **Fiscal Quarter 4.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.

f **Additional information.** Click the calendar icon to indicate the start of the next fiscal year.

NOTE: A fiscal year cannot be greater than 99 weeks in length. If you enter a value for Next Fiscal Year Start that is greater than 99 weeks from the start date of the previous fiscal year, an error message prompts you to enter a correct value.

7 Click Save.

NOTE: You must create fiscal calendars in sequence, for example, you must create the fiscal calendar for 2010 before you create the fiscal calendar for 2011.

Your new custom fiscal calendar definition is not reflected in Analytics until a nightly ETL (Extract, Transform, Load) is run.

To view a fiscal calendar's detail

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

2 In the Company Administration section, click the Company Administration link.

3 In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.

4 On the Fiscal Calendar List page, click the name of the fiscal year for which you want to view the fiscal periods.

The Fiscal Calendar Detail page displays the individual fiscal months for the selected year and the next fiscal year start date.

NOTE: If you are moving from a standard fiscal calendar to a custom fiscal calendar, your previous fiscal year records appear as read-only in the Fiscal Calendar List page and all future, fiscal-year records that Oracle CRM On Demand generates are deleted. For more information on standard fiscal calendars, see About Fiscal Calendars (on page 59).

To edit your company's fiscal calendar

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
4. On the Fiscal Calendar List page, locate the fiscal calendar that you want to update, and click Edit.
5. Enter the new details for the fiscal calendar, and click Save.

   Any changes to a custom fiscal calendar definition are not reflected in Analytics until a nightly ETL (Extract, Transform, Load) is run.

NOTE: If you have defined a custom fiscal calendar, you can change it by editing the existing calendar definition. However, fiscal calendars prior to the current fiscal year are read-only. You cannot delete custom fiscal calendars.

Managing Your Company's Lists of Periods

You can manage the lists of fiscal calendar periods for your company to limit the number of periods available for selection in the Period lookup window in, for example, business plan and objective records. This is useful, for example, because your company might require sales personnel to create quarterly business plans, while human resources personnel must only create yearly business plans.

To manage your company's lists of periods you can:

- Create and refine lists of periods
- For each list of periods, define the search fields used in the Period lookup window.
- For each user role, define which lists are available in the Period lookup window.

Note: Users can only select lists of periods in the Period lookup windows if the Record-Type Lists in Lookup Windows menu on the company profile is set to Enabled. For more information about this menu and what it controls, see Searching for Records in Lookup Windows and Setting Up Your Company Profile and Global Defaults (on page 19).

Managing the Lists of Periods

The following procedure describes how to manage your company's lists of periods.

To manage the lists of periods

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Fiscal Calendar Administration section, click the Fiscal Period Administration link.
4. In the Period List page, select options from the Menu button as follows:
   - **Record Count.** Count the number of periods in the period list, see Counting Records in Lists.
   - **Refine List.** Refine the period list by specific criteria and save the list under a new name, see Creating and Refining Lists.
   - **Save List.** Save a list. When you click Save List, this brings you directly to a page with Save options.
   - **Show List Filter**. Show the key information for a list in the drop down menu, see View List Page. You can also access this page by clicking View in the Manage Lists page.
   - **Manage Lists.** Manage the period lists, see Manage Lists Page.
   - **Create New List.** Create a new filtered period list, see Creating and Refining Lists.

Defining the Period Search Layout

The following procedure describes how to define a search layout for a list of periods.

Before you begin. Your role must include the Customise Application privilege.

To define the period search layout

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click Period.
4. In the Period Application Customisation page click Period Search Layout.
5. Define the search layout.

   For more information on creating search layouts, see Managing Search Layouts (on page 195).

Defining the Lists of Periods Available for Each Role

The following procedure describes how to define which lists of periods are available for each role.

Before you begin. Your role must include the Customise Application privilege.

To define the lists of periods available for each role

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click Period.
4. In the Period Application Customisation page click Period List Access & Order.
5. For each role, define which lists are available and the order of the lists.

   For more information on managing list access and the display order for each role, see Managing List Access and List Order (on page 201).

Currency Definition

Defining currencies for your company includes:

- Activating the currencies in which your company transacts business.
- Defining currency exchange rates for your company's base currency.

For information about currency definition, see Managing Currencies (on page 65).

Managing Currencies

To allow users to conduct and track business in any currency, you need to activate these currencies. Otherwise, the default currency set up for the company is the only option.

If your employees record transactions in other currencies, you also need to set up exchange rates between these currencies and your company's default currency. The application uses the exchange rates when rolling up revenue for reports and forecasting.

CAUTION: Make sure that you set up exchange rates for all currencies you have activated before your users enter any transactions.

You can enter multiple exchange rates for any active currency. Each entry consists of the Exchange Date and an Exchange Rate for that date. When determining which exchange rate is to be used for a particular transaction, the application applies the following rules:

How Oracle CRM On Demand Converts Exchange Rates Between the Company Default Currency and the User's Default Currency

In this case, a company has the following currencies:

- The default currency for a company is the U.S. dollar (USD).
- This company also has additional currencies activated: the euro (EUR) and pound sterling (GBP).

- This company has defined exchange rates between USD and EUR, and between USD and GBP.
- The user enters the opportunity revenue in EUR. However, the user default currency is GBP.
- Oracle CRM On Demand performs the EUR to GBP conversion as follows:
  - It first converts the opportunity revenue to the company default currency; that is, from EUR to USD.
  - It then converts the opportunity revenue to the user's currency; that is, from USD to GBP.

How Exchange Rates Are Applied to Forecast Rollups

In this case, the following rules apply:

- If there is an exchange rate defined for the same date as the transaction, it uses this Exchange Rate value.
- If there is no exchange rate defined for the same date as the transaction but there are exchange rates defined for dates before the transaction, it uses the exchange rate with the date that is nearest to the transaction date.
- If there is no exchange rate defined for the same date as the transaction and there are no exchange rates defined for dates before the transaction, it uses the next available exchange rate that has a date *after* the transaction date.

For example, if exchange rates are only entered for 15/05/2004 and 15/08/2004, then the following occurs:

- For transactions prior to 15/05/2004, the 15/05/2004 rate is used.
- For transactions between 15/05/2004 and 14/08/2004, the 15/05/2004 rate is used.
- For transactions on or after 15/08/2004, the 15/08/2004 rate is used.

How Exchange Rates Are Applied to Reports

For reports, exchange rates are applied in a more general way than for forecasting. A single exchange rate is determined for each month, and all transactions within a month use this rate. For example, for opportunities, Oracle CRM On Demand uses the Opportunity Close Date that is closest to the Exchange Rate Effective Date. For asset currency-conversions, Oracle CRM On Demand uses the Purchase Date field as the date. For opportunity products, Oracle CRM On Demand uses the exchange rate that is closest to the start date of the product revenue. For other objects, including custom objects 01-03, Oracle CRM On Demand uses the created date to determine the exchange rate date. For custom objects 04-15, Oracle CRM On Demand uses the Exchange Date field.

The exchange rate assigned to a month is determined as follows:

- If more than one exchange rate exists for a month, the exchange rate with the latest date in that month is used.
- If no exchange rates exist for a month, that month's exchange rate is set to the same rate as the nearest future month for which a date is defined.
- If there are no exchange rates for future months, the first previous month's exchange rate is used.

For example, if exchange rates are defined for 10/05/2004, 20/05/2004 and 14/08/2004, then:

- The May 2004 rate will be the value set for 20/05/2004 (the latest rate set for May).

- The August 2004 rate will be the value set for 14/08/2004 (the only rate set for August).
- April 2004 and prior months will be assigned the rate for 5/20/2004. There are two dates for the month of May.
- June and July 2004 will be assigned the August 2004 rate (nearest future month).
- September 2004 and future months will be assigned the August 2004 rate (no future month, so first previous month is used).

In reports, any values that require conversion between currencies will use the exchange rate defined for the month that the transaction falls in, calculated as described above.

NOTE: During forecasting, all opportunities are converted to the company default currency for forecast rollups. However, in reports, revenue fields are converted to the end user's currency amount.

You need to wait until the daily analytics refresh runs when either of the following situations occurs:

- A new currency is activated for your company and the exchange rate is set up
- A new currency is selected by a user that no other user for your company has selected (on the Personal Detail page)

The refresh automatically generates any required cross exchange rates. After this, you can run historical or real-time reports.

Whenever users change their default user currency, they must sign out of Oracle CRM On Demand, and then sign in again before reports display data in the newly selected currency.

Before you begin. To perform the procedures for managing currencies, your role must include the Manage Company - Define Currencies privilege. Also, to understand the effect of currency settings, read About Profile Settings for Users.

To activate currencies

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Currency Definition section, click the Currency Definition link.
4. On the Currency Set-up page, select All Currencies from the drop-down list.
5. Click the Edit link for the currency you want to activate.
6. On the Currency Edit page, select the Active checkbox.
7. (Optional) On the Currency Edit page, you can change the symbol corresponding to the currency.

   For example, you might want to distinguish currencies by their currency codes instead of by their symbols. Therefore, you would change $ to USD, ¥ to JPY and € to EUR.

   NOTE: You can use any symbol to represent a currency, except those symbols used by certain locales for thousands separators or decimals points, that is, a period (.), a comma (,) or a space ( ).
8. Save the record.

To define the exchange rates

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

2 In the Company Administration section, click the Company Administration link.

3 In the Currency Definition section, click the Exchange Rates link.

The Exchange Rate Edit page appears with the latest exchange rates for your activated currencies. If no exchange rate has been defined, it appears blank.

NOTE: The *To Currency* is always the currency that is set for your company. You must enter exchange rates that tell the application how to convert each active currency to this currency.

4 To add a new exchange rate for an active currency:

a Click the Exchange History link for the Currency row for which you want to add a rate.

On the Exchange Rate page, click New.

b On the Exchange Rate Edit page, complete the required information.

For Exchange Rate, enter how many units of the *To Currency* it would take to buy one unit of the *From Currency*.

Example: 1 Euro = .68 UK Pounds.

Assuming your company's currency is set to UK pounds (GBP), you would enter the following values:

- From Currency: EUR
- To Currency: USD
- Exchange Rate: 1.3

5 Click Save.

To view a history of exchange rates

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

2 In the Company Administration section, click the Company Administration link.

3 In the Currency Definition section, click the Exchange Rates link.

On the Exchange Rate Edit page, the latest exchange rates appear for different currencies.

4 To see the history of exchange rates for a single currency, click the Exchange Rate History link.

A history of the exchange rates appears.

Division Setup

Your company can use the Division record type to organise your users into groupings to meet your business needs. For example, you can use divisions to organise users on a geographical basis. You can associate a user with one or more divisions. The first division that is associated with a user record is automatically specified as the primary division for the user, but you can change the primary division for the user. You can associate divisions with picklist value groups, so that for users in certain divisions, the values that appear in the picklists in certain fields on records are limited to subsets of the values that are defined for the fields. Each division can be associated with one picklist value group only. For more information about picklist value groups, see About Picklist Value Groups (on page 229).

NOTE: The division information on a user's record does not affect the user's rights to access records and to work with records.

If a user is associated with one or more divisions, then when the user creates a record of a record type that supports divisions, the user's primary division is automatically assigned to the record. If the Division field and the Picklist Value Group field are both present on the Detail page layout, and if a picklist value group is associated with the user's primary division, then the Picklist Value Group field on the record is populated with the name of that picklist value group. Then, in any picklist field that is controlled by the picklist value group, only the values that are linked to the picklist value group appear in the picklist.

A user can change the division on any record as long as all of the following are true:

- The Division field is present on the page layout that is assigned to the user's role for a record type.
- The Division field is not specified as a read-only field.
- The user has the necessary access rights to update the record.

NOTE: By default, the All Divisions list is available in the Lookup window for the Division field, and a user can select any division. You can set up lists of divisions and specify which lists are available in the Lookup window for the Division field for user roles. For more information, see Managing List Access and List Order (on page 201).

When a user changes the division on a record, the picklist value group for the record automatically changes to the picklist value group for the new division. For more information about the behaviour of the Division and Picklist Value Group fields when records are created and updated, see About Divisions and Picklist Value Groups on Records (on page 75) and About Picklist Fields, Picklist Value Groups, and Divisions.

For information about setting up divisions, see the following topics:

- Considerations When Setting Up Divisions (on page 70)
- Process of Setting Up Divisions (on page 70)
- Creating Divisions (on page 71)
- Associating Picklist Value Groups with Divisions (on page 72)
- Associating Users with Divisions (on page 72)

Related Topics

See the following topics for related information:

- Record Types That Support Picklist Value Groups and Divisions (on page 232)
- About Merging Divisions and Deleting Divisions (on page 74)

- About Divisions and Picklist Value Groups on Records (on page 75)
- Changing the Primary Division for a User (on page 289)

Considerations When Setting Up Divisions

When setting up divisions, consider the following:

- **Customisation.** You can customise the Division record type.
- **Lists.** You can create lists of divisions.
- **Picklist value groups.** You can associate a division with one picklist value group only.
- **Users.** You can associate multiple users with each division, and you can associate each user with multiple divisions.
- **Search.** You cannot search for division records in the Action bar or in an advanced search.
- **Division field.** For record types that support divisions, you can do the following:
  - Add the Division field to page layouts.
  - Specify the Division field as read-only if you do not want users to be able to change or clear the value in the field.
  - Use the Division field in Expression Builder.
  - Use the Division field in workflow rules.
  - Include the Division field in the search layouts.

NOTE: You cannot specify a default value for the Division field through the Fields Setup pages.

Related Topics

See the following topics for related information:

- Process of Setting Up Divisions (on page 70)
- Creating Divisions (on page 71)
- Associating Picklist Value Groups with Divisions (on page 72)
- Associating Users with Divisions (on page 72)
- About Divisions and Picklist Value Groups on Records (on page 75)
- Changing the Primary Division for a User (on page 289)

Process of Setting Up Divisions

Before you begin. Review the information in Considerations When Setting Up Divisions (on page 70).

To set up divisions for your company, perform the following tasks:

1 Determine the following:

- The divisions that you want to set up.
- The picklist value group that you want to associate with each division, if any. Each division can be associated with only one picklist value group, but a picklist value group can be associated with multiple divisions.
- The users that you want to associate with each division.

2 Create your divisions.

For more information, see Creating Divisions (on page 71).

3 (Optional) Associate picklist value groups with the divisions.

For more information, see Associating Picklist Value Groups with Divisions (on page 72).

4 Associate users with the divisions.

For more information, see Associating Users with Divisions (on page 72).

5 (Optional) Add the Division field to the page layouts for the record types on which you want to use divisions.

For more information, see Customising Static Page Layouts (on page 165) and Specifying Dynamic Page Layouts (on page 213).

Creating Divisions

To create a division, complete the steps in the following procedure. This task is a step in Process of Setting Up Divisions (on page 70).

Before you begin. To perform the following procedure, you must have the Manage Roles and Access privilege in your user role.

To create a division

1 Click the Admin global link.

2 In the Company Administration section, click Company Administration.

3 In the Division Setup section, click Division Setup.

4 In the Division List page, click New.

5 Enter a name and a description for the division, and then save your changes.

Related Topics

See the following topics for related information:

- Division Setup (on page 69)
- Considerations When Setting Up Divisions (on page 70)
- Process of Setting Up Divisions (on page 70)
- Associating Picklist Value Groups with Divisions (on page 72)
- Associating Users with Divisions (on page 72)

Associating Picklist Value Groups with Divisions

You can associate only one picklist value group with each division. However, each picklist value group can control the values for one or more picklist fields on one or more record types, and each picklist value group can be associated with multiple divisions. For more information about picklist value groups, see About Picklist Value Groups (on page 229).

To associate a picklist value group with a division, complete the steps in the following procedure. This task is a step in Process of Setting Up Divisions (on page 70).

Before you begin. To perform the following procedure, you must have the Manage Roles and Access privilege in your user role. In addition, the Picklist Value Group field must be present on the Division Detail page layout for your user role.

To associate a picklist value group with a division

1. Click the Admin global link.
2. In the Company Administration section, click Company Administration.
3. In the Division Setup section, click Division Setup.
4. In the Divisions List, click the name of the division with which you want to associate a picklist value group.
5. In the Division Detail page, in the Picklist Value Group field, click the Lookup icon, and then select the picklist value group that you want to associate with the division.
6. Save your changes.

NOTE: For the picklist value groups to control the values that appear in the picklist fields on a record, the Picklist Value Group field must be present on the Detail page layout for the record type.

Associating Users with Divisions

You can associate a user with one or more divisions. The first division that is associated with a user is automatically designated as the user's primary division, but you can change the primary division on a user's record. For more information, see Changing the Primary Division for a User (on page 289).

You can associate users with divisions in two ways:

- From a division record, you can associate users with the division.

- From a user record, you can associate divisions with the user.

To associate users with a division, complete the steps in the following procedure. This task is a step in Process of Setting Up Divisions (on page 70).

Before you begin. To perform the following procedure, you must have both the Manage Users privilege and the Manage Roles and Access privilege in your user role. In addition, the Division Users related information section must be present on the Detail page layout that is assigned to your role for the Division record type.

To associate users with a division

1. Click the Admin global link.
2. In the Company Administration section, click Company Administration.
3. In the Division Setup section, click Division Setup.
4. In the Divisions List, click the name of the division with which you want to associate users.
5. On the Division Detail page, scroll to the Division Users related information section and click Add.
6. Select the user that you want to associate with the division and save your change.

   You can add up to 10 users at one time. To associate more users with the division, click Save and Add Users.

To associate divisions with a user from the User Detail page, complete the steps in the following procedure.

Before you begin. To perform the following procedure, you must have both the Manage Users privilege and the Manage Roles and Access privilege in your user role. In addition, at least one of the following must be true:

- The Primary Division field is present on the Detail page layout that is assigned to your role for the User record type.
- The User Divisions related information section is present on the User Admin page layout that is assigned to your role.

NOTE: On the User record type, a text field named Division is also available. The Division text field is part of the User record type.

To associate divisions with a user

1. Click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the User and Group Management section, click the User Management link.
4. In the User List, click the last name of the user with whom you want to associate divisions.

5 On the User Detail page, do one of the following:

- If you want to associate a single division only as the primary division for the user, then in the Primary Division field, click the Lookup icon, and select the division that you want to be the primary division for the user.
- If you want to associate multiple divisions with the user, then scroll to the Divisions related information section and click Add. You can add up to 10 divisions at one time. To associate more divisions with the user, click Save and Add Divisions.

About Merging Divisions and Deleting Divisions

You can delete a division even if the division is associated with users and with records. You can also merge two divisions into one. When you merge two divisions, one division is retained and the other division is deleted.

After a division is deleted as a result of a merge operation, the following happens:

- The division is removed from any user records with which the division was associated.
- Any users who were associated with the division that is deleted and who were not previously associated with the retained division are automatically associated with the retained division. If the deleted division was a user's primary division, then the division that is retained becomes the user's primary division.
- If the deleted division was associated with records of other record types such as accounts, contacts, and so on, then the records are not automatically associated with the division that is retained in the merge operation. Instead, the Division field on the records is automatically cleared. However, the Picklist Value Group field on the records is not cleared.

After you delete a division directly, the following happens:

- The division is removed from any user records with which the division was associated. If the deleted division was the primary division for a user, then the first division in the list of remaining divisions that are associated with the user's record becomes the user's primary division.
- If the deleted division was associated with records of other types, such as accounts, contacts, and so on, then the Division field on those records is automatically cleared. However, the Picklist Value Group field on the records is not cleared.

You can associate a different division with any record where the Division field was cleared as a result of a division being deleted. When you associate a division with a record in which the Division field was cleared, the Picklist Value Group field on the record is updated as follows:

- If the new division is associated with a picklist value group, then the Picklist Value Group field on the record is populated with the picklist value group for the new division.
- If the new division is not associated with a picklist value group, then the Picklist Value Group field on the record is cleared.

You can restore a deleted division. When you restore a division, any associations that previously existed between the restored division and user records are not restored. Any associations that previously existed between the restored division and records of other types, such as accounts, contacts, and so on are restored.

For step-by-step instructions for merging records, see Merging Records.

About Divisions and Picklist Value Groups on Records

The following table summarises the behaviour of the Division and Picklist Value Group fields when users create and edit records. In all cases in this table, it is assumed that:

- Each division is associated with a picklist value group.
- Each user is associated with at least one division.
- The Division field and the Picklist Value Group field are both present on the Detail page layout.

Division Field Can Be Updated	Picklist Value Group Field Can Be Updated	When a User Creates a Record the Following Behaviour Applies	When a User Updates a Record the Following Behaviour Applies
Yes	Yes	■ The Division field is populated with the primary division for the user who creates the record. The user can change the value in the Division field before saving the record. ■ The Picklist Value Group field is populated with the picklist value group for the division. The user can change the value in the Picklist Value Group field before saving the record.	■ The user can change the value in the Division field or the Picklist Value Group field. ■ If the user clears the Division field, then the Picklist Value Group field is automatically cleared. ■ If the user selects a different division, then the Picklist Value Group field is populated with the picklist value group for the new division. ■ If the user selects a different picklist value group or clears the Picklist Value Group field, then the Division field is not automatically changed.
No	Yes	■ The Division field is populated with the primary division for the user who creates the record. The user cannot change the value in the Division field. ■ The Picklist Value Group field is populated with the picklist value group for the division. The user can change the value in the Picklist Value Group field before saving the record.	■ The user cannot change the value in the Division field. ■ The user can change the value in the Picklist Value Group field. ■ If the user selects a different picklist value group or clears the Picklist Value Group field, then the Division field is not automatically changed.
Yes	No	■ The Division field is populated with the primary division for the user who creates the record. The user can change the value in the	■ The user can change the value in the Division field. ■ The user cannot directly change the value in the Picklist Value

Division Field Can Be Updated	Picklist Value Group Field Can Be Updated	When a User Creates a Record the Following Behaviour Applies	When a User Updates a Record the Following Behaviour Applies
		Division field before saving the record. ■ The Picklist Value Group field is populated with the picklist value group for the division. The user cannot change the value in the Picklist Value Group field on the record.	Group field. ■ If the user clears the Division field, then the Picklist Value Group field is automatically cleared. ■ If the user selects a different division, then the Picklist Value Group field is populated with the picklist value group for the new division.
No	No	■ The Division field is populated with the primary division for the user who creates the record. The user cannot change the value in the Division field on the record. ■ The Picklist Value Group field is populated with the picklist value group for the division. The user cannot change the value in the Picklist Value Group field on the record.	The user cannot change the value in the Division field or the Picklist Value Group field.

Related Topics

See the following topics for related information:

- Division Setup (on page 69)
- Considerations When Setting Up Divisions (on page 70)
- Process of Setting Up Divisions (on page 70)
- Creating Divisions (on page 71)
- Associating Picklist Value Groups with Divisions (on page 72)
- Associating Users with Divisions (on page 72)
- Changing the Primary Division for a User (on page 289)
- About Picklist Value Groups (on page 229)
- Considerations When Setting Up Picklist Value Groups (on page 230)
- Process of Setting Up Picklist Value Groups (on page 231)

- Creating Picklist Value Groups (on page 231)
- Mapping Picklist Values to Picklist Value Groups (on page 160)

Company Audit

Audit trail is an important capability for meeting regulatory and corporate policy compliance. Refer to the following topics for information about audit trail in Oracle CRM On Demand:

- Reviewing Sign-In Activity for All Users (on page 77)
- Reviewing Your Company's Resource Usage (on page 78)
- Reviewing Audit Trail Changes with the Master Audit Trail (on page 79)
- Reviewing the Audit Trail for Administration Configuration Changes (on page 81)
- Reviewing Your Company's Pending and Sent Emails (on page 82)
- Reviewing All Export Requests for Your Company (on page 83)

Reviewing Sign-In Activity for All Users

You can review the sign-in history for all users at your company. The sign-in history page shows which of your users are using the application and when. The sign-in history page also records sign-in activity by Oracle CRM On Demand Customer Care.

NOTE: User sign-in records that are older than 90 days are continuously purged from Oracle CRM On Demand. The user adoption history data is stored in the data warehouse to support the historical trend analysis of user adoption metrics in Oracle CRM On Demand analytics, but the data is not retained when a full extract, transform, and load (ETL) of data is performed during an upgrade of Oracle CRM On Demand to a new release, or when company data is migrated from one Oracle CRM On Demand environment to another Oracle CRM On Demand environment. For information about the Usage Tracking Analysis analytic subject area, see Usage Tracking Analysis Analytic Subject Area.

Before you begin. To perform this procedure, your role must include the Manage Company – Sign In and Company Audit privilege.

To review sign-in activity for all users

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Audit section, click the Sign-in Audit link.

   The Sign In Audit page displays all sign-in audit activity for Oracle CRM On Demand.

   NOTE: The Type field in a sign-in record shows the channel through which the sign-in attempt was made. For example, if a sign-in attempt is made through a browser window, then the Type field shows

the value Interactive. If a sign-in attempt is made through Web services, then the Type field shows the value Web Services.

4 On the Sign In Audit title bar, select one of the following lists from the menu:

- **All Sign In Audit.** Your default setting for viewing sign-in activity. This displays all sign-in audit data and is sorted by sign-in time.
- **All Users Currently Signed In.** All users that are currently signed into Oracle CRM On Demand. This is sorted by sign-in time.

NOTE: This menu also displays any custom lists that you created.

To manage sign-in activity lists

- On the Sign In Audit title bar, click the Menu button to perform the following actions :
  - **Export List.** Export the Sign-in Activity list to save on your computer, see Exporting Records in Lists.
  - **Record Count.** Count the records in the Sign-in Activity list, see Counting Records in Lists.
  - **Refine List.** Refine the Sign-in Activity filtered list, see Creating and Refining Lists.
  - **Manage Lists.** Manage the Sign-in Activity Lists, see Manage Lists Page.
  - **Create New List.** Create a new filtered Sign-in Activity list, see Creating and Refining Lists.
  - **Save List.** Save the Sign-in Activity list, this brings you directly to a page with Save options.

Related Topics

See the following topic for related information:

- Reviewing Sign-In Activity for a User (on page 290)

Reviewing Your Company's Resource Usage

You can review the resource usage for your entire company, including changes to these areas:

- Reset Password
- Forget Password
- Answer Security Questions
- Change SSO Identifier
- Change to User ID
- Change to Email address
- Set Password

- Initial Password
- Offline

NOTE: Resource usage records that are older than 90 days are continuously purged from Oracle CRM On Demand. However, records are not purged when a user is created, or when the following fields are modified: Email, External Identifier for Single Sign-On, Role, Status, User Sign In ID.

Before you begin. To perform this procedure, your role must include the Manage Company – Sign In and Company Audit privilege.

To review your company's resource usage

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Audit section, click the Audit link.
4. Review the resource usage history for your company.

The following procedure describes how to manage lists of resource usage records.

To manage lists of resource usage records

- In the title bar of the Audit Trail page, click Menu, and then select the option for the task that you want to perform, as follows:
  - **Export List.** Export the list to a file, see Exporting Records in Lists.
  - **Record Count.** Count the records in the list, see Counting Records in Lists.
  - **Refine List.** Refine the list, see Creating and Refining Lists. For example, you can change the list filter, select different fields to display, or change the sort order for the list.
  - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.
  - **Show List Filter.** View the filter that is currently defined for the list.
  - **Create New List.** Create a new filtered list, see Creating and Refining Lists.
  - **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page.

Reviewing Audit Trail Changes with the Master Audit Trail

You can review the audit trail of changes that users made to audited fields for all auditable record types. If the options to track the creation, deletion, and restoration of records are selected in the audit trail configuration for the record type, then the master audit trail also shows the audit trail records for these operations.

Before you begin. To perform this procedure, your role must include the Access Master Audit Trail and Admin Configuration Audit privilege.

To review audit trail changes with the Master Audit Trail

1. In the upper-right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Audit section, click the Master Audit Trail link.

   The Master Audit Trail displays the following values:

   - **ID#.** The table row ID.
   - **Record Type.** The record type being audited.
   - **Record Name.** The name of the record being audited.
   - **Source IP Address.** The IP address of the computer on which the configuration change took place.

     NOTE: This value is displayed only when this information is available.
   - **Session Type.** This value indicates if the session was interactive or a Web services session.
   - **Last Name.** The user's last name.
   - **First Name.** The user's first name.
   - **User Sign In ID.** The user's login ID.
   - **Operation.** The type of configuration that was performed, for example, create, delete, or modify.
   - **Field Modified.** The field modified in the object.
   - **Old Value.** The previous value of the field.
   - **New Value.** The new value of the field. For example, if you change the value of the service request priority field from Low to High, then the Old Value field remains as Low, and the New Value field is High. If you delete a record, the Old Value field remains blank, and the New Value field changes to Record Deleted.
   - **Date.** The date when the object was last audited.

For more information about the audit trail, see Customising the Audit Trail (on page 206).

The following procedure describes how to manage lists of audit trail records.

To manage lists of audit trail records

- In the title bar of the Master Audit Trail page, click Menu, and then select the option for the task that you want to perform, as follows:
  - **Export List.** Export the list to a file, see Exporting Records in Lists.
  - **Record Count.** Count the records in the list, see Counting Records in Lists.
  - **Refine List.** Refine the list, see Creating and Refining Lists. For example, you can change the list filter, select different fields to display, or change the sort order for the list.
  - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.

- **Show List Filter.** View the filter that is currently defined for the list.
- **Create New List.** Create a new filtered list, see Creating and Refining Lists.
- **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page.

Reviewing the Audit Trail for Administration Configuration Changes

You can review the audit trail of changes that administrators make to roles, books, access profiles, REST integration tag names, previous owner customisation, and the audit trail setup for record types.

Before you begin. To perform this procedure, your role must include the Access Master Audit Trail and Admin Configuration Audit privilege.

To review the audit trail for administration configuration changes

1. In the upper-right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Audit section, click the Admin Configuration Audit link.

   The Admin Configuration Audit table displays the following values:

   - **ID#.** The table row ID.
   - **Record Type.** The record type being audited.
   - **Record Name.** The name of the record being audited.
   - **Source IP Address.** The IP address of the computer on which the configuration change took place.

     NOTE: This value is displayed only when this information is available.
   - **Session Type.** This value indicates if the session was interactive or a Web services session.
   - **Last Name.** The user's last name.
   - **First Name.** The user's first name.
   - **User Sign In ID.** The user's login ID.
   - **Operation.** The type of configuration that was performed, for example, create, delete, or modify.
   - **Field Modified.** The field modified in the object.
   - **Old Value.** The previous value of the field.
   - **New Value.** The new value of the field. For example, if you change the value of the service request priority field from Low to High, then the Old Value field remains as Low, and the New Value field is

High. If you delete a record, the Old Value field remains blank, and the New Value field changes to Record Deleted.

- **Date.** The date when the object was last audited.

The following procedure describes how to manage lists of administration configuration changes.

To manage lists of administration configuration changes

- In the title bar of the Admin Configuration Audit page, click Menu, and then select the option for the task that you want to perform, as follows:
  - **Export List.** Export the list to a file, see Exporting Records in Lists.
  - **Record Count.** Count the records in the list, see Counting Records in Lists.
  - **Refine List.** Refine the list, see Creating and Refining Lists. For example, you can change the list filter, select different fields to display, or change the sort order for the list.
  - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.
  - **Show List Filter.** View the filter that is currently defined for the list.
  - **Create New List.** Create a new filtered list, see Creating and Refining Lists.
  - **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page.

Reviewing Your Company's Pending and Sent Emails

The Email Monitor page displays the following information:

- **Email Monitor Summary.** Displays the number of pending emails from Oracle CRM On Demand.
- **Outbox.** Displays specific details pertaining to emails waiting to be sent from Oracle CRM On Demand.
- **Sent Items.** Displays specific information pertaining to emails already sent from Oracle CRM On Demand. Sent email items that are older than 30 days are continuously purged from Oracle CRM On Demand. You can use Alpha search to locate a sent email.

Before you begin. To perform this procedure, your role must include the Access Master Audit Trail and Admin Configuration Audit privilege.

To review pending and sent email from Oracle CRM On Demand

1. In the upper-right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Audit section, click the Email Monitor link.

   The Outbox and Sent Items sections display the following values:

- **Type.** This column displays one of the following values:
  - **Customer.** An email sent by the user to a customer.
  - **Operations.** An email sent by Oracle CRM On Demand to Oracle CRM On Demand Customer Care.
  - **Service.** An email sent by Oracle CRM On Demand to a customer.
- **Status.** This column displays one of the following values:
  - **Queued.** The email request has not been processed yet.
  - **In Progress.** The email is being processed. Oracle CRM On Demand attempts to send an email 3 times. If on the third attempt the email fails to send, the status changes to Error.
  - **Sent.** The email has been successfully sent.
  - **Error.** The email request did not complete because an error occurred.
- **From.** The name of the person or company from whom the email was sent.
- **Sent.** The date and timestamp the email was sent.
- **To.** The email addresses of all the recipients to whom the email was sent.
- **Initiated By.** The login ID of the user who initiated the email.
- **Subject.** The subject of the email.

For more information about the audit trail, see Customising the Audit Trail (on page 206).

Reviewing All Export Requests for Your Company

The Master Export Request Queue page displays a list of the pending and completed export requests that are currently retained for your company. You can review the export requests that were submitted from List pages, as well as the export requests that were submitted through the Data Export Assistant. You can also retrieve the attachments that contain the output from the requests.

About the Retention Period for Export Requests and Export Request Attachments

In the standard application, Oracle CRM On Demand retains the details of export requests and their output for a certain period, as follows:

- The details of an export request are retained for 60 days, and are then purged.
- The output from an export request is retained for 168 hours (that is, seven days), and is then purged.

The retention periods apply to export operations that are submitted through List pages, as well as to export operations that are submitted through the Data Export Assistant.

Your administrator can change the retention periods for export requests and their attachments, by changing the values in the following fields on the company profile:

- Export Request Expiry Days

- Export Request Attachment Expiry Days

For information about updating these fields, see Configuring Company Settings (on page 21).

The following procedure describes how to review all export requests for your company.

Before you begin. To perform the following procedure, your user role must have the Access Master Export Requests privilege.

To review all export requests for your company

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click Company Administration.
3. In the Company Audit section, click Master Export Requests.

   When you first open the Master Export Request Queue page, the list of requests is sorted by the submitted date, with the most recently submitted request at the top of the list. You can limit the requests that you see by selecting a list from the drop-down Export Requests field. You can also use the quick filter fields to further refine the lists.

   The following table describes the fields on the Master Export Request Queue page.

   NOTE: For export requests that are submitted through List pages, the names of the exported lists are not shown on the Master Export Request Queue page. If you want to see the list names, then you can refine the list of requests and add the List field. However, adding the List field to the page can affect the performance of the Master Export Request Queue page.

Export Record Information	Description
Type	The type of request, either Personal or Company.
Export Type	The type of export: - **Full**. A full export of your company's data. - **Partial.** A partial export of your company's data. - **List.** An export request made from a List page.
Record Type	The record types. For partial requests that include child records, the child record is indicated in the format *Parent*:*Child*, for example: Account:Contact.
Status	The status, for example: In Progress or Completed.
Client Name	The name of the client application.
Requested For	The user for whom the request was submitted.

Export Record Information	Description
Requested By	The user who submitted the request. An administrator can create a personal extract request for a user through Web services.
Submitted	The time and date when the export request was submitted.
Completed	The time and date when the export request was finished.
# Exported	The number of records that were exported.

The following procedure describes how to review the details of an export request.

To review the details of an export request

- In the row for the request, click the Export Type or Record Type link to open the List Export Request Detail page or the Export Request Details page.

  The page displays the export properties, including the number of records exported (# Exported). For export requests that were submitted through the Data Export Assistant, the page also shows the number of record types successfully exported without any problems (# Completed Objects). In the Export Record Types section of the page, you can see details of the number of records that were exported for each record type.

For information about downloading and deleting export request attachments, that is, the ZIP files that contain the output from the export requests, see Downloading and Deleting Export Request Attachments.

NOTE: To download the export request attachments for export operations performed by all users, your user role must have the Access all Export Request Attachments privilege. If your user role does not have this privilege, then you can download only the attachments for the export operations that were performed by you or your subordinates.

Managing Lists of Export Requests

A number of filtered lists are available in the drop-down picklist of lists in the Master Export Request Queue page. You can refine the existing lists, for example, you can add and remove fields from a list. You can also create new lists. The following procedure describes how to manage lists of export requests.

To manage lists of export requests

- In the title bar of the Master Export Request Queue page, click Menu, and then select the option for the task that you want to perform, as follows:
  - **Export List.** Export the list to a file, see Exporting Records in Lists.
  - **Record Count.** Count the records in the list, see Counting Records in Lists.
  - **Refine List.** Refine the list, see Creating and Refining Lists. For example, you can change the list filter, select different fields to display, or change the sort order for the list.

- **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.
- **Show List Filter.** View the filter that is currently defined for the list.
- **Create New List.** Create a new filtered list, see Creating and Refining Lists.
- **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page.

Alert Management

The alert functionality in Oracle CRM On Demand enables you to broadcast time-based, critical information to your company users. For information about alerts, see the following topics:

- Reviewing Your Alerts
- Publishing Company-Wide Alerts (on page 86)
- Working with Lists
- Alert Fields (on page 87)

Publishing Company-Wide Alerts

Company-wide alerts appear on each employee's My Homepage. You can use alerts to broadcast company-wide information, such as meeting notices and policy changes. You can also configure an alert to display information whenever a user logs in to Oracle CRM On Demand.

NOTE: Alerts announcing that a forecast has been generated remain on the employees' My Homepage for two days. To extend the period the alert appears, make the changes on the Alert Edit page after the alert first appears. For instructions, follow the procedure in this section.

You can link files or URLs to alerts. For example, when creating a meeting notice alert, you can add a link to a Web page with directions to the meeting location. Instead of displaying alerts to all users in your company, you can also assign alerts to specific roles. In general, users can review only the alerts that are displayed for all users, and the alerts that are configured to be displayed for their own role. However, if your role includes the Manage Company privilege, then you can review all alerts, including the alerts that are restricted to certain roles.

Before you begin. (Optional) Create or locate a Web page or file that contains information that you want to share. Ensure that the path to the Web page or file is accessible to your users. To perform this procedure, your role must include the Manage Company privilege.

To create or update company-wide alerts

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

2 In the Company Administration section, click the Company Administration link.

3 In the Alert Management section, click the Company Alerts link.

The Alerts page appears with a list of company alerts.

4 On the Alerts page, perform one of the following:

- Click the New button.
- Click the title of the alert you want to edit, and then click the Edit button.

5 On the New Alert or Alert Edit page, complete the required information.

6 Save the alert.

7 To add an attachment to the alert, click the alert title on the Alerts list page to open the alert details.

8 Click the Attachments tab on the Alert Information page.

9 Click the Add Attachment button, and enter the information.

10 On the Attachment Edit page, click Save.

11 To add a URL to the alert, click the alert title on the Alerts list page to open the alert details.

12 Click the Attachments tab on the Alert Information page.

13 Click the Add URL button, and enter the information.

14 On the Attachment Edit page, click Save.

15 To assign an alert to a specific role, click the alert title on the Alerts list page to open the alert details.

NOTE: If no role is selected, then the alert is displayed to all users and roles in the company.

16 Click the Associated Roles tab on the Alert Information page.

17 Click the Add button.

18 In the Search for a Role dialog, search for the appropriate role, and click Select.

19 When done adding roles, click Save.

The Search for a Role dialog closes and the Alert Information page now displays the selected role(s) for the alert.

Alert Fields

The following table describes the field information you might see in an alert record. If you are an administrator, you can see and update all alert fields. Otherwise, you are restricted to viewing a limited number of alert fields.

Field	Description
Title	Title of the alert as it will appear on My Homepage.
Priority	Priority of the alert, which is indicated by the icon next to it on My Homepage.
Hyperlink	URL or filename and directory path associated with the alert.
Alert Description	Text as it will appear in the alert.
Post Date	Date you want the alert to begin being broadcast across My Homepage.
Expiration Date	Date you want the alert to end being broadcast across My Homepage.
Displayed Hyperlink	Text as it will appear for the hyperlink in the alert. This is required if you have entered a hyperlink. For example, for the Link (URL) “http://company.site/doc_2389.html”, you might type “Directions to meeting” for the hyperlink text in the alert.

TIP: You can create filtered lists to limit the type of alert records displayed at one time. For instructions, see Working with Lists.

Related Topics

See the following topic for related information about company-wide alerts:

- Publishing Company-Wide Alerts (on page 86)

Service Allotment Administration

Administering service allotments includes:

- Viewing Service Allotment Usage for Your Company (on page 90)
- Viewing Historical Service Allotment Usage (on page 91)
- Setting Alerts for Service Allotments (on page 92)
- Viewing File and Record Utilisation Information (on page 93)

About Service Allotments

You can view all of the service allotments for your company to see the current and historical usage and to enable alerts when allotments reach the defined threshold values. Customer Care sets the service allotment values for your company.

In the Service Allotment List page, you can see the defined allotment value, the current usage, and the remaining usage values. You can drill down on a service allotment to set an alert for the service allotment. When you enable an alert, you define a threshold value on a service allotment, which causes an email warning to be sent to the specified recipients when the threshold is reached.

In the Allotment Usage List page, you can track your company's usage against service allotments over time. You can view, daily, weekly, or monthly usage, although this view varies with the allotment type. You can export the allotment data and allotment usage data for a company, using the Export Assistant. For information about using the Export Assistant, see Exporting Your Data (on page 783).

Allotments That Are Updated Continuously in a 24-Hour Period

The following allotments are measured and updated continuously over a 24-hour period:

- **Report Services Bandwidth Allotment.** Indicates the amount of data that a company can process each day using the report services.
- **Report Services Concurrent Allotment.** Indicates the maximum number of requests that a company can submit using the report services at any time.
- **Report Services Operations Allotment.** Indicates the number of daily operations that are allowed for a company that is using report services. When a call is made to submit a report service, it is considered to be an operation.
- **Web Services Operations Allotment.** Determines the number of Web services operations that a company can perform within a 24-hour period.
- **Web Services Concurrent Request Allotment.** Determines the maximum number of concurrent Web service requests that a company can process.

NOTE: Requests from Oracle CRM On Demand Desktop do not count towards the Web Services Operations Allotment or the Web Services Concurrent Request Allotment.

The names and descriptions of service allotments are displayed in your active language.

For more information on the report service allotments, see Oracle CRM On Demand Report Services API Developer's Guide , and for more information on Web Services allotments, see Oracle Web Services On Demand Guide.

Allotments That Are Updated One Time in a 24-Hour Period

Oracle CRM On Demand updates the following allotments one time in a 24-hour period:

- **File Allotment.** Determines the file allotment for the company, which is the amount of storage available for files attached to records.

  NOTE: The attachments to signature records and images added to record detail pages are not included in the calculation of the amount of storage used by the company.

- **Record Allotment.** Determines the record allotment for the company, which is the number of records of all types.

  For more information about which records are counted in the calculation of the number of records stored for the company, see 2266885.1 (Article ID) on My Oracle Support.

  NOTE: Signature records and export request records are not counted in the calculation of the number of records stored for the company.

Oracle CRM On Demand updates the current usage for record and file allotments one time in every 24 hour period. In addition, when a record is deleted or restored in batch, or a new record is created through an import operation, Oracle CRM On Demand updates the current usage for the parent record types when the

operation completes. The current usage is shown on the Current Usage field on the Service Allotment Detail page.

Real Time Updated Allotments

Oracle CRM On Demand updates the following allotment in real time:

- **CRM Desktop Licences.** Indicates the number of CRM Desktop users licensed by your company.

What Happens When Allotments Are Fully Used?

When usage reaches the total company limit for Web services allotments, further requests to Oracle CRM On Demand Web services are not processed. Allotment capacity is released hourly, and the amount of capacity released varies depending on past usage. New requests will be processed when the current usage for the preceding 24-hour period has fallen below the allotment value for your company.

To avoid reaching the total company allotment, optimise Web service clients to avoid unnecessary requests. For more information, see Oracle Web Services On Demand Guide.

When usage reaches the total company limit for the Record allotment, the following can no longer interact with the Oracle CRM On Demand application:

- Web services that are attempting Insert, Update, or InsertOrUpdate operations on records
- Imports using the Import Assistant or Oracle Data Loader On Demand
- Desktop clients, such as Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand

To avoid reaching the total company allotment, users can delete any records from the application that are no longer necessary. When usage reaches the total company limit for the file allotment, users can no longer upload attachments using the following:

- The Oracle CRM On Demand application
- Web services
- Any desktop clients

If the Export Request Attachment Expiry Days field on the company profile is set to a value that is less than or equal to 7, then export request attachments are not included in the calculation of the amount of storage used by your company. However, if that field is set to a value greater than 7, then the export request attachments are included in the calculation of the amount of storage used by your company, and after the file allotment limit is reached, export requests will fail.

To avoid reaching the total company allotment, users can delete any attachments that are no longer necessary.

NOTE: For all service allotments, users can contact their sales representative and purchase additional capacity, additional licences, or both. For further assistance, contact Customer Care.

Viewing Service Allotment Usage for Your Company

You can view the following data for each service allotment for your company:

- The allotment name
- The allotment type
- The allotment units
- The value set for the allotment by Customer Care
- The amount of the allotment currently used
- The amount of the allotment remaining
- Whether an alert is enabled for the allotment. If the current usage exceeds the threshold value, an email alert is sent to the defined recipients.

  NOTE: Oracle CRM On Demand only sends an email alert if the trigger comes from a bulk upload, a Web service request, or Oracle Data Loader On Demand. Entering records manually in Oracle CRM On Demand does not trigger email alerts.

- The user who last modified the allotment data

From the Service Allotment List Page, you can drill down on a service allotment to see more information about the allotment, for example, a description of the allotment, and current usage data in the Allotment Usages applet.

On the Allotment Usage List page, you can see the historical usage data about an allotment. For more information, see Viewing Historical Service Allotment Usage (on page 91).

You can click Edit on the Service Allotment List page and then set an alert for an allotment. For more information, see Setting Alerts for Service Allotments (on page 92).

To view your company's service allotment usage

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Service Allotment Administration section, click the Service Allotment Administration link.
4. In the Service Allotment List page, view the service allotment data for your company.

Viewing Historical Service Allotment Usage

From the Allotment Usage List page, you can review historical usage data about the allotments for your company. By default, the allotment usages are listed by period start time, and the period, allotment type, allotment name, allotment units, allotment used, and created date are displayed. You can view allotment usages for daily, weekly, or monthly periods, although this view varies with the allotment type.

The following table describes what you can do from the Allotment Usage List page.

To do this	Follow these steps

To do this	Follow these steps
Create a new list of allotment usages	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in Creating and Refining Lists.
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists.
Manage allotment usages lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task as described in Manage Lists Page.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in Creating and Refining Lists.
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page.
Sort the allotment usages in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records that you want to see at one time.

Setting Alerts for Service Allotments

You can set an alert for a service allotment so that when the allotment usage reaches a certain threshold value, an email is sent to notify specified users. If alerts are enabled for a service allotment, the following defaults apply:

- **Alert Recipients.** The email address of the primary contact for the company
- **Alert Threshold.** Seventy percent of the allotment value

For existing customers, alerts are disabled by default. For new customers, alerts are enabled by default.

Note: You cannot set an alert for the Web Services Concurrent Request allotment.

In addition to the threshold alert, an automatic alert email is sent to either the primary contact or the specified email recipients when current usage reaches a company's allotment value. If alerts are enabled, then the email indicating that the allotment has been reached is sent to the specified recipients.

To set an alert for a service allotment

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Service Allotment Administration section, click the Service Allotment Administration link.

4 In the Service Allotment List page, click Edit.

5 In the Service Allotment Edit page, complete the following fields:

- **Alert Recipient**. Enter the email addresses of the users who will receive a warning email.
- **Alert Threshold**. Enter the percentage of the allotment value at which the alert email will be sent.
- **Alert Enabled**. Select this check box to enable the sending of alert emails.

Viewing File and Record Utilisation Information

At intervals, Oracle CRM On Demand takes a snapshot of the amount of file and record storage that your company is using. The information is kept for 90 days, after which it is purged from the database. To help you to keep track of the amount of file and record storage that your company uses, you can view details about the following:

- The number of file attachments that were stored when the snapshot was taken
- The amount of file storage that was used by your company when the snapshot was taken
- The number of records that existed for your company when the snapshot was taken

NOTE: Files and records that were deleted but not purged from Oracle CRM On Demand are not included in the calculation of file and record utilisation.

The following procedure describes how to view file utilisation information.

To view file utilisation information

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

2 In the Company Administration section, click the Company Administration link.

3 In the Service Allotment Administration section, click File Utilisation to open the File Utilisation List page.

By default, the File Utilisation List page displays the Current File Usage list. The Current File Usage list shows the information from the most recent snapshot. If you want to view the information from all of the snapshots taken over the last 90 days, select the All File Usage list in the title bar of the list page.

The following table describes the information shown on the File Utilisation List page.

Column Name	Description
Record Name	The name of the record type as it appears in the user interface. If your company customised the name of the record type, the customised record type name appears in this column. **NOTE:** If no files were attached to the records of a given record type for your company when the snapshot was taken, then the record type is not listed.

Column Name	Description
Number of Files	The number of files that were attached to the records of the listed record type for your company in Oracle CRM On Demand when the snapshot was taken.
File Allotment Used (MB)	The amount, in megabytes, of file storage used by your company in Oracle CRM On Demand to store file attachments for records of the listed record type when the snapshot was taken.
Date	The date and time of the snapshot.

The following procedure describes how to view record utilisation information.

To view record utilisation information

1. In the upper-right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Service Allotment Administration section, click Record Utilisation to open the Record Utilisation List page.

   By default, the Record Utilisation List page displays the Current Record Usage list. The Current Record Usage list shows the information from the most recent snapshot. If you want to view the information from all of the snapshots taken over the last 90 days, select the All Record Usage list in the title bar of the list page.

   The following table describes the information shown in the Record Utilisation List page.

Column Name	Description
Record Name	The name of the record type as it appears in the user interface. If your company customised the name of the record type, the customised record type name appears in this column. **NOTE:** If no records existed for a given record type for your company when the snapshot was taken, then the record type is not listed.
Record Allotment Used	The number of records of the listed record type that existed for your company in Oracle CRM On Demand when the snapshot was taken.
Date	The date and time of the snapshot.

TIP: For information about using the menu options on the File Utilisation List page and the Record Utilisation List page, see Working with Lists.

Address Administration

Address administration includes turning the address-sharing functionality on or off (using the Enable Shared Addresses setting in the company profile), enabling address validation (using the Validate Shared Addresses

setting in the company profile), converting unshared addresses to shared addresses, and other tasks. For more information about address administration, see the following topics:

- Converting Unshared Addresses to Shared Addresses (on page 95)
- Considerations When Turning Off Shared Addresses (on page 98)
- Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses (on page 99)
- Setting the Address Type for Unshared Addresses Using Edit Rel (on page 100)
- Access Profile and Role Settings for Addresses (on page 100)

Related Topics

- Addresses
- Setting Up Your Company Profile and Global Defaults (on page 19)

Converting Unshared Addresses to Shared Addresses

Release 19 and earlier releases of Oracle CRM On Demand used unshared addresses. You can continue to use unshared addresses in this release. However, if you want to convert unshared addresses from earlier releases to shared addresses that are supported in this release, then you must complete the following procedure.

Note: If the data files are large and the import operations take longer than you expect, then you can use Oracle Data Loader On Demand with the same input files and mapping files that are defined in this procedure.

Before you begin: It is assumed that Oracle CRM On Demand Customer Care has upgraded your company to the current release. To complete this procedure, you must be a company administrator who can perform import and export operations and customise Oracle CRM On Demand. You require the Manage Addresses privilege to enable shared address functionality.

NOTE: When moving to shared addresses from unshared addresses, you must use the Web Services v2.0 API for all Web services requests because the Web Services v1.0 API does not support access to shared addresses.

To convert unshared addresses to shared addresses

1. If required, deselect the Enable Shared Addresses setting in the company profile.
2. Export the data from the address-related objects that you want to convert to shared addresses.

   The list includes the following items:

   - All account data sections including:
     - Accounts
     - Account Addresses
     - Contacts
     - Account Partners

- Addresses

- All contact data sections including:
  - Contacts
  - Contact Addresses
  - Accounts
  - Addresses
- All dealer data sections including:
  - Dealer
  - Dealer Addresses
- All partner data sections including:
  - Partner
  - Partner Addresses
- All address data

This export operation must export all the relevant account, contact, partner, dealer, and address data from Oracle CRM On Demand to an external file. You must be able to use the external file with the data correction and standardisation method that you choose.

3 Correct and reformat the data so that importing these addresses into Oracle CRM On Demand does not contain duplicate data and so that the account, contact, dealer, and partner data is set up with the associated addresses.

Many duplicate and invalid addresses will probably exist after the export operation. For example, because addresses were not shared in earlier releases, contacts residing at the same location might have identical or similar addresses. However, minor differences might arise because of typing and other errors. For the duplicate addresses that are likely to occur, reimporting the records (for example, accounts) and associating them with newly created shared address records will not delete the pre-existing address associations from the earlier release. Consequently, you must do the following:

- Verify your data and then remove duplicate records when preparing the address data that you want to import.
- Take ownership for the pre-existing unshared address data associated with your account, contact, dealer, and partner records if you decide to associate those records with the shared address version of the address data. That is, you must account for, remove and disassociate, and choose whether to retain the pre-existing unshared address data.

For information on preparing the data for import, see the following topics:

- Address Fields: Import Preparation (on page 625)
- Account Fields: Import Preparation (on page 613)
- Contact Fields: Import Preparation (on page 651)
- Dealer Fields: Import Preparation
- Partner Fields: Import Preparation (on page 729)

4 Import the address record data:

   a Choose the import file name with the address data and the appropriate mapping file.

   b Allow the import to complete.

   Importing the shared Address top-level record data is a prerequisite for importing account, contact, dealer, and partner record data. For information on importing data, see Importing Your Data (on page 776).

5 Import the account record data:

   a Choose the option to create associated records.

   b Allow the import to complete.

   This import creates the accounts and associates the shared addresses with the accounts. For information on importing data, see Importing Your Data (on page 776).

6 Import the contact record data:

   a Choose the option to create the associated records.

   b Allow the import to complete.

   This import creates the contacts and associates the shared addresses with the contacts. For information on importing data, see Importing Your Data (on page 776).

7 Import the dealer record data:

   a Choose the option to create the associated records.

   b Allow the import to complete.

   This import creates the dealers and associates the shared addresses with the dealers. For information on importing data, see Importing Your Data (on page 776).

8 Import the partner record data:

   a Choose the option to create the associated records.

   b Allow the import to complete.

   This import creates the partners and associates the shared addresses with the partners. For information on importing data, see Importing Your Data (on page 776).

9 Confirm that the data has been imported correctly.

10 Set up the page layouts for the appropriate roles in your company, and assign the appropriate access to the page layouts for users.

11 Update your users' roles to include the Record Type Access role in step 2 of the Role Management wizard.

If you do not complete this step, then users cannot view address records. For example, if they attempt to associate an address record with an account, then an error message is displayed.

12 Select the Enable Shared Addresses setting in the company profile to enable shared addresses.

13 If your company uses applications that are external to Oracle CRM On Demand to mark addresses as valid, and if you want to use only those validated addresses in address picklists, address searches, and address associations, then select the Validate Shared Addresses setting in the company profile.

NOTE: The Validation Date in an address record must be set to mark the address as validated. For more information, see Marking Shared Addresses as Validated.

14 (Optional) After you have verified that the imported data is correct, you can delete the pre-existing unshared address data by using Web services.

For more information about Web services, see Oracle Web Services On Demand Guide.

Considerations When Turning Off Shared Addresses

If you turn off shared addresses after having turned it on, then the addresses created from that point onwards are unshared addresses. That is, any new address created for an account, contact, dealer, or partner is created only for that record and is not shared with other records. However, the address records that were previously shared among account, contact, dealer, or partner records continue to be shared until they are edited. For example, if you have three accounts (A, B, and C) that share an address, after turning off shared addresses, then the address continues to be shared for the three accounts. If a user edits an address, for example, Account A, then Oracle CRM On Demand creates a new, unshared address record for Account A, but Accounts B and C continue to use the shared address until these addresses are also edited.

NOTE: Before turning off shared addresses you must remove access to address records for end users at your company, remove the Manage Addresses privilege from their user roles, and reset page layouts as required. For information on the procedure to remove this access and privilege, see Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses (on page 99).

The following considerations apply when turning off shared addresses after this feature was turned on:

- **The company administrator has access to the customisation pages.** The company administrator who has the Manage Addresses privilege continues to have access to the Oracle CRM On Demand customisation pages and can continue to work with the address layouts, field management, and so on.
- **Users can create a new unshared billing or shipping address.** Users who create a new account, dealer, or partner can create a new unshared billing or shipping address, or both. Users who create a new contact can create a new unshared primary contact address. The new address is associated only with the newly created record, and it is not available on the top-level Address tab.
- **Users can edit only the address**. Users who edit an account, contact, dealer, or partner can edit only the address for that account, contact, dealer, or partner record because shared addresses are turned off. If the address record that is being edited was previously a shared address, then Oracle CRM On Demand creates a new address that is associated only with the edited record, and the address is not available on the top-level Address tab. If the address record that is being edited was not previously a shared address, then the address is edited, but Oracle CRM On Demand does not create a new address.
- **Orphan deleted addresses might be created.** Removing a billing or shipping address from an account, dealer, or partner results in an orphan, deleted address for the account, dealer, or partner. Similarly, removing a primary address from a contact results in an orphan, deleted address for the contact.

For information about turning off shared addresses, see the information on the Enable Shared Addresses setting in Setting Up Your Company Profile and Global Defaults (on page 19).

Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses

Before turning off shared addresses, company administrators must do the following:

- Modify users' access to address records to read.
- Remove the Manage Addresses privilege from user roles

Before you begin. You must be a company administrator who can use the Access Profile Wizard and the Role Management Wizard.

To update user access profiles before turning off shared addresses

1. Set the access level for the Address record type as follows:
   a. Click Admin, User management and Access, and then Access Profile.
   b. Click the Edit menu item for the access profile for your users.
   c. In Step 2 of the Access Profile Wizard, set the access level for the Address record type to Read, and click Finish.
2. Turn off the Manage Addresses privilege as follows:
   a. Click Admin, User management and Access, and then Role Management.
   b. Click the Edit menu item for the role name for your users.
   c. In Step 4 of the Role Management Wizard, deselect the Manage Addresses privilege.
3. Sign out of Oracle CRM On Demand, and then sign in to Oracle CRM On Demand to ensure that the changes take effect.
4. Turn off the Enable Shared Addresses setting in the company profile as follows:
   a. Click Admin, Company Administration, and then Company Profile.
   b. Deselect the Enable Shared Addresses setting.
   c. Sign out of Oracle CRM On Demand, and then sign in to Oracle CRM On Demand to ensure that the change takes effect.

For more information about specifying access level types by using the Access Profile Wizard, see Specifying Access Levels for Primary Record Types (on page 334). For more information about specifying privileges for a user's role by using the Role Management Wizard, see Role Management (on page 302).

Setting the Address Type for Unshared Addresses Using Edit Rel

You can set the address type for an unshared address by using the Edit Rel (Edit Relationship) menu item on the record-level menu for an unshared address. The Edit Relationship feature enables a company administrator to customise aspects of the address records (for example, field and page layouts) without having the shared address functionality enabled for users.

The following are some of the characteristics of the Edit Rel menu item:

- In the default Edit page, all fields are read-only except for the Address Type field. Other custom fields that are not read-only might be available on the Edit page if it has been customised.
- If the Enable Shared Addresses setting is selected, then the Edit Rel menu item is unavailable on the record-level menu for the Addresses section. In this case, a user can use the Edit page to edit the Billing, Shipping, or Primary settings and can select a different address.
- If the Enable Shared Addresses setting is deselected, and the user has the Manage Addresses privilege and the Has Access permission to the top-level Address record, clicking New or Edit on the record-level menu on the Addresses section takes the user to the top-level Address new or edit view.

Before you begin. The Enable Shared Addresses setting is deselected, and the Manage Addresses privilege is selected.

To set the address type for unshared addresses by using the Edit Rel menu item

1. In the Detail page for an account, contact, dealer, or partner record, navigate to the Addresses related information section.
2. From the record-level menu, choose Edit Rel.
3. From the picklist for the type, select the address type.

   The following are the address types that are available by default: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic.

Access Profile and Role Settings for Addresses

For access to the top-level address records and to shared addresses in accounts, contacts, dealers, and partners, you must have the appropriate settings in your access profile and user role. As the company administrator, you assign the access to specific roles for each of these records in a user's access profile.

You can assign the following access levels for the many-to-many relationship for shared addresses:

- For top-level address records:
  - ReadOnly
  - Read/Edit

- Read/Edit/Delete

- For address records in the Addresses related information section in accounts, contacts, dealers, and partners:
  - No Access
  - ReadOnly
  - Read/Create
  - Read/Create/Edit
  - Read/Edit
  - Read/Edit/Delete
  - Full

Privileges and Settings That Control Access to Shared Address Functions

The following privileges and settings control access to the following shared address functions:

- **Manage Addresses privilege.** Controls a user's access to the Address field set up pages, and the availability of the Address record in the Access Profile and Role Management wizards.
- **Validate Shared Addresses privilege.** Controls whether a user can validate an address by setting the validation date.
- **Enable Shared Addresses setting.** Controls whether top-level Address records can be shared, and whether addresses in account, contact, dealer, and partner records use the shared or unshared functionality.

  If the Enable Shared Addresses setting is deselected and the Manage Addresses privilege is selected, then only unshared address functionality is available in account, contact, dealer, and partner records. This option is accessible in the company profile by users with the Manage Company privilege.
- **Validate Shared Addresses setting.** Controls whether Oracle CRM On Demand validates the shared addresses in a company. If this setting is selected, then users can select validated shared addresses to add to an account, contact, dealer, or partner record. Non-validated addresses are filtered from accounts, contacts, dealers, or partners, and the New address button is disabled in these records. This setting is accessible in the company profile by users with the Manage Company privilege.

  When the Validate Shared Addresses setting is deselected, all addresses are available in accounts, contacts, dealers, or partners; that is, no filtering takes place and the New address button is enabled in these records for users with the necessary privileges.

The following table summarises whether various settings and privileges are required to perform shared address tasks, and their relationship to the shared address functions.

Task	Enable Shared Addresses Setting	Manage Addresses Privilege	Minimum Required Shared Address Rights	Validate Shared Addresses Privilege
Customising the Address pages and fields for shared addresses	No	Yes	None	No

Task	Enable Shared Addresses Setting	Manage Addresses Privilege	Minimum Required Shared Address Rights	Validate Shared Addresses Privilege
Changing the address format in accounts or contacts from *unshared* to *shared*	Yes	No	None	No
Validating shared addresses	No	No	Read/Edit	Yes
Updating the access profile for shared addresses	No	Yes	None	No
Sharing an address between accounts, contacts, dealers, or partners	Yes	No	Read	No
Enabling address records in the Role Management wizard	No	Yes	None	No
Accessing the Address tab	No	No	Read	No
Accessing the Address Homepage, Detail, and Edit pages	No	No	Read Edit Access is required for Edit pages.	No
Updating the Account Addresses, Contact Addresses, Dealer Addresses, or Partner Addresses sections in the corresponding records	Yes	No	Read	No

Application Customisation

Your company probably has specific requirements for how data is gathered and recorded, what terminology is used, and how information needs to be presented so that employees have what they need to be productive. Application customisation lets you customise Oracle CRM On Demand to meet your company requirements, including page layout, field management, and list access requirements.

The following examples illustrate some ways in which you can customise the application:

Example 1: You might want all of your sales representatives to include an email address on all of their contact records. The best way to make sure that this requirement is met is to make the Email field a required field. Then, anyone who creates a new contact record cannot save it unless it includes an email address.

Example 2: You have two groups of employees that each need to track different information on an account page. You can meet this requirement by creating a different account page layout for each group and providing the appropriate access through role assignment.

The Application Customisation page has two sections:

- **Record Type Set-up**. Contains links for each of the top-level record types. When you click a link, you are taken to a record-type-specific customisation page. Depending on your company set-up, industry-specific record types might not be visible within Oracle CRM On Demand. Also, industry-specific records might require customisation according to your company's specific needs. For more information on the tasks that you can perform from the individual application customisation pages, see Record Type Application Customisation Page (on page 104).
- **Application Set-up**. Contains links to various customisation functions that are not specific to a record type. Click a topic to see step-by-step instructions for the procedures available from the Application Set-up section:
  - Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 224)
  - Creating Picklist Value Groups (on page 231)
  - Creating and Managing Action Bar and Global Header Layouts (on page 240)
  - Creating Global Web Applets (on page 234)
  - Uploading Client Side Extensions (on page 236)
  - Managing Custom HTML Head Additions (on page 239)
  - Creating and Managing Action Bar and Global Header Layouts (on page 240)
  - Customising My Homepage for Your Company (on page 243)
  - Enabling Custom Reports in My Homepage (on page 244)
  - Renaming Record Types (on page 246) and Adding Record Types (on page 250)
  - Changing the Icon for a Record Type (on page 252)
  - Customising REST Integration Tags (on page 253)
  - Creating New Themes (on page 253)
  - Uploading and Managing Custom Icon Sets (on page 248)
  - Uploading and Managing Custom Global Header Icons (on page 249)
  - Customising Previous Ownership for Shared Records (on page 261)

  NOTE: For the My Homepage Layout and My Homepage Custom Report functions, your role must include the Customise Application - Manage Homepage Customisation privilege.

Before you begin:

- To perform the application customisation procedures, your role must include the Customise Application privilege.
- Ensure that you understand your business needs:
  - Talk with your business owners to understand their business processes and needs for the application.
  - Determine the fields, display names, values for picklists and other custom fields required to support their needs.
  - Determine how the fields should be laid out on the interface and what fields must be marked as required.

- Use the Field Set-up and Page Layout templates, available in the Tools and Templates area of the Training and Support Centre, to help you document your application customisation requirements.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (see "Important Considerations for Customers Using Customised Code in Oracle CRM On Demand" on page 235).

Record Type Application Customisation Page

For each record type there is an Application Customisation page with links for customisation tasks that you can perform for that record type.

The following table describes each of the possible sections on an Application Customisation page, and lists the tasks that you can perform when you click the links in that section. The sections displayed depend on the record type and some sections are only visible if your role includes a particular privilege. For all customisation procedures, the Customise Application privilege is required.

For the Call Activity History record type, Oracle CRM On Demand supports only field management customisation in the user interface. You can use administrative Web services to read field and record customisation details relating to Call Activity History. Field management customisation is described in the following table.

NOTE: In the topics referenced in the following table, a placeholder for the name of a record type is indicated by the words, *record type,* in italics. For example, if you are working on accounts, replace *record type* with *account* in the following text: click the *record type* Field Audit Set-up link.

Section	Tasks	Additional Privilege Required
Field Management	Renaming fields, creating custom fields, managing picklist values, specifying default values for a field, setting up field validation, and selecting whether a field can be copied or not. For more information about these tasks, see: About Field Management (on page 106) About Custom Fields (on page 114) Creating and Editing Fields (on page 125) Administering the Copy Enabled Setting (on page 137) Managing Field Labels (on page 152) Using Indexed Custom Fields (on page 154) Changing Picklist Values (on page 158) Mapping Picklist Values to Picklist Value Groups (on page 160)	None

Section	Tasks	Additional Privilege Required
	Reverting Settings to Defaults (on page 157)	
	Advanced defining of default fields and field validation	Advanced Field Management
Page Layout Management	Creating and managing static page layouts. For more information about these tasks, see: Customising Static Page Layouts (on page 165) Customising Related Item Layouts (on page 161) Renaming Field Section Titles (on page 174) Creating and customising page layouts that can be used to create new records, see: Customising Page Layouts for Creating New Records (on page 172) Creating and managing Web applets that can be used on Detail page layouts; see: Creating Web Applets for Record Types (on page 177) For information about advanced page layout management, see Specifying Dynamic Page Layouts (on page 213).	None
Cascading Picklists	Defining and managing cascading picklists. For more information about these tasks, see: Defining Cascading Picklists (on page 193)	None
Search and List Layout Management	Specifying targeted search fields and managing layouts for search results. Also, managing the behaviour of the Lookup Windows and enabling smart associations. For more information about these tasks, see: Managing Search Layouts (on page 195)	None
List Access and Order	Managing default list access and the display order for each role. For more information about these tasks, see:	None

Section	Tasks	Additional Privilege Required
	Managing List Access and List Order (on page 201)	
Homepage Layout Management	Creating and managing Homepage layouts and specifying custom reports to be displayed on the Homepages. For more information about these tasks, see: Creating Record Homepage Layouts (on page 205) Creating Homepage Custom Reports (on page 202)	Customise Application – Manage Homepage Customisation
Field Audit Set-up	Customising the field audit trail for your company. For more information about these tasks, see: Customising the Audit Trail (on page 206)	Administer Field Audit This feature is available only for certain record types.
Dynamic Layout Management	Creating and managing dynamic page layouts. For more information about these tasks, see: Specifying Dynamic Page Layouts (on page 213)	Customise Application - Manage Dynamic Layouts

For some record types, the Field Management and Page Layout sections contain links for that record type and also links for the related record type. For example, the Account Application Customisation page contains links for the following:

- Account Field Set-up
- Account Contact Field Set-up
- Account Partner Field Set-up
- Account Relationship Field Set-up
- Account Team Field Set-up

About Field Management

In Oracle CRM On Demand you can perform the following field management tasks for the different record types:

- Creating and Editing Fields (on page 125)
- Managing Field Labels (on page 152)

- Changing Picklist Values (on page 158)

When you create custom fields or edit field definitions, you can specify default values for the field that take effect when new records are created. You can also specify that field validation is performed for the field to ensure that it has a particular value.

About Copying Fields

Most record types in Oracle CRM On Demand have a copy function; that is, users can copy the current record they are using. When a user clicks the Copy button on the Record Detail page, it opens a new record page. This new Record Page contains all the fields that can be copied. A user can change and save these fields.

NOTE: When you use the Copy button, only the base record is copied, but not the related item for child records.

The following restrictions apply when using the copy function:

- Web links, concatenated fields, system fields, address fields, calculated and reference fields cannot be copied. The Copy Enabled check box is unavailable for these items.
- Read-only fields cannot be copied. Read-only fields are fields that are set as read-only in the field set-up or in fields layout.
- Fields that are unavailable on a user's form layout cannot be copied.
- The following attachment fields cannot be copied:
  - Attachment
  - Attachment: File Name
  - Attachment: Size (In Bytes)

You can copy fields by using the Copy button in record detail pages in Oracle CRM On Demand. You can enable this setting by using the Copy Enabled check box in the Field Management page of the Application Customisation section of Oracle CRM On Demand. For more information on specifying which fields can be copied in Oracle CRM On Demand, see Administering the Copy Enabled Setting (on page 137).

Required Fields

There are various situations where you might define fields as required. For example, your company might require that every service request must track information on the cause of a service request. In this case, you specify that the Cause field for service requests is required. Then, when a record is created or updated and then saved, the application validates that the Cause field is NOT NULL.

When you specify a field as Required, the validation is enforced through all interfaces, including the user interface, Web Services, and data import.

The fields specified as required in the Field Edit page are required fields for all users, regardless of their role. If you need to make a field required for a specific role only, you can do so by editing the appropriate page layout for fields that are not already required fields. For more information, about editing page layouts, see Customising Static Page Layouts (on page 165).

Conditionally Required Fields

You can configure a field so that it is conditionally required, that is, the field is not required by default, but it becomes required when a defined condition is met. For more information, see About Conditionally Required Fields (on page 122).

Read-Only Fields

The following are situations in which you might define fields as read-only:

- **Fields from external sources.** If your company tracks, for example, the credit rating of an account in an external system, it is likely that you want the credit rating to be updated regularly through a nightly import, but only want the field to be read-only in the UI.
- **Moving an existing field to a custom indexed field**. If you want to use one of the index custom fields for an existing custom field, you can specify that users can have read-only access only to the old field while you move data to the new index field. This field definition avoids data becoming out of sync.

NOTE: Certain system fields are always read only and can be updated only by Oracle CRM On Demand. Some examples of fields that are always read only are the Created field and the Created: Date field, both of which are available on many record types.

Custom Field Validation Rules

You can use Oracle On Demand Expression Builder (Expression Builder) to create expressions for custom field validation rules. You can click the *fx* icon next to the Field Validation field to open the Expression Builder window in which you can enter an expression. For information about the syntax you can use for expressions, see Expression Builder (on page 845).

The following are situations in which you might define custom field validation rules:

- **Enforcing business policy**. For example, if your company has a business policy whereby an MDF cannot be effective for more than one year, you can define a validation rule on an End Date field to ensure that the field value is never more than one year from the Start Date.

  As another example, your company might have a business policy whereby if an opportunity is lost, which had an expected revenue of $100,000 or greater, the reasons for losing it must be tracked. In this case, you set up a validation rule on the Status field so that when a user attempts to save an opportunity record with the Status field set to Lost, Oracle CRM On Demand determines whether the expected revenue is $100,000 or greater, and whether the Reason Won/Lost field is blank. You can also set up the message that is to display when the validation fails. In this case, the message warns the user to select a value in the Reason Won/Lost field before saving the record.

  NOTE: For the business process where you want the Reason Won/Lost field to be required in certain circumstances only, you can alternatively set up the Reason Won/Lost field as a conditionally required field. For more information, see About Conditionally Required Fields (on page 122).

- **Enforcing data format**. For example, if your company uses a value-added tax (VAT) number on a European account, you can specify that validation of the correct VAT format, based on an account's invoicing address. As another example, you might specify that the value for a specific custom field is no more or no less than four digits long.

A validation expression for a field is evaluated each time the field is updated on a new or existing record. However, a validation expression is not evaluated in the following circumstances:

- The field is left blank when the record is created or modified. Field validation does not force a value to be required.
- The field has a pre-existing value, either valid or invalid, and the value is not changed when the record is updated.

If a validation expression is not evaluated, or if a validation expression evaluates to NULL, no error message is generated. An error message is generated only when the validation expression fails (that is, the expression evaluates to FALSE).

Field validation expressions assume that the first parameter is the field name itself. If, for example, you are putting a simple field validation expression on an Amount field to specify that the value must be greater than 1000, it is sufficient to enter >1000. You do not need to enter [<Amount>]>1000. For more information on more complicated expressions, see About Expressions (on page 849).

Restrictions on Specifying Field Validation Rules

You cannot specify field validation rules for the following types of fields:

- System fields
- Internal calculated fields
- RowID and ID fields

  NOTE: Remember that Row_ID is an internal system field. Depending on the operation transitions, for example, during record creation, it is not always guaranteed to remain static. It can differ to ExternalSystemID or the IntegrationID.
- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code.
- Web links
- Concatenated fields
- The following attachment fields:
  - Attachment
  - Attachment: File Name
  - Attachment: Size (In Bytes)

About Defining Default Field Values

You can specify default values for fields in the Default Value field in the Field Edit page when you create custom fields or edit field definitions.

Specifying a default value for a field is useful where you require:

- A constant value for a field. For example, you might want an Account Type field to have a default value of Customer when a new record is created.

- A formula-based value as default. For example, you might want the default value for a Due Date field of Fund Requests to take a default value of 6 months after the value of the Create Date field.
- The generation of a unique value for a field. For example, you might want to specify an expression to generate a unique number as an ID for an Expense Report field. (This field is also read-only.)
- A role-specific default value. For example, in a company where the majority of the service requests (SR) are created by customer service representatives (CSR), a Reassign flag field might be selected by default so that, if, for example, a sales representative opens the SR, it is routed to the correct CSR based on predefined assignment rules.

NOTE: Most of these are only possible if your role includes the Advanced Field Management privilege.

There are two types of default values for fields:

- **Pre Default**. The field is pre-populated with the specified value when a user creates a new record. Users can overwrite the default value or accept the default value.
- **Post Default**. The field is not pre-populated with the specified value when a user creates a new record, but the field takes the specified default value when the record is saved, if:
  - The user leaves the field blank
  - The field is hidden from the layout
  - A value has not been supplied by the integration tools

Pre Default is the default type of value for fields. You can specify Post Default by selecting the check box of that name in the Field Edit page.

Default field values are applicable to new records only, and not applicable to record updates.

If you specify a default value for a field that already has a system-specified default, your value takes precedence for your company. An exception to this rule is the Revenue field on Opportunity records. Any default or post default values you specify for this field are ignored, because the field is used in the generation of forecasts based on opportunity revenue.

You cannot set default values for the following types of fields:

- System fields
- Internal calculated fields
- RowID and ID fields

  NOTE: Remember that Row_ID is an internal system field. Depending on the operation transitions, for example, during record creation, it is not always guaranteed to remain static. It can differ to ExternalSystemID or the IntegrationID.
- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code
- Web links
- Concatenated fields
- Check boxes (Post Default values)

- The following attachment fields:
  - Attachment
  - Attachment: File Name
  - Attachment: Size (In Bytes)

The following table shows the default values that you can specify for the different field types in Oracle CRM On Demand.

Field Type	Valid Default Values
Check box	Y if the checkbox should be checked and the Boolean value is true. N if the checkbox should be unchecked and the Boolean value is false. Blank represents an undefined value for a checkbox even though it appears unchecked **Note:** You cannot select Post Default for a check box field.
Currency	A valid numeric value up to 15 digits.
Date	Today + *number*, where *number* represents a specific number of days. The default date is calculated as today's date plus the number entered. For example, if today is 1 January 2008, and you enter Today + 7, the default value is set to 8 January 2008.
Date/Time	As for the Date field type, but in addition the time when the new record is opened is also shown.
Integer	A valid numeric value between -2147483648 and 2147483647.
Multi-select picklist	You cannot define a default value for a multi-select picklist.
Note	A text value up to 16350 characters.
Number	A valid numeric value between -2147483648 and 2147483647.
Percent	A valid numeric value between -2147483648 and 2147483647.
Phone	A valid telephone number.
Picklist	The picklist value selected will be the default value for the field.
Text (Long)	A text value up to 255 characters.
Text (Short)	A text value up to 40 characters for custom fields and most preconfigured fields. However, for some preconfigured fields you can enter more than 40 characters. For example, the Account record type can have a name longer than 40 characters, therefore the length of the value for the Default field is not restricted to 40 characters.
Text (Short-	A text value up to 40 characters in which some of the data is

Field Type	Valid Default Values
Maskable)	hidden from view from some users. For example, if a maskable field contains the value 4558785236, then users see XXXX5236. A user role must include the View Masked Data privilege to see the data in the maskable field. For more information, see About Maskable Fields.
Web link	A valid URL. Expressions and validation is not allowed. A default value can be set through the Web Link edit page. The Display Text field can contain up to 250 characters. The URL field can contain up to 8000 characters. Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length changes if you are using parameter substitution.

NOTE: If you create an expression to set a default value, the result of the expression must not exceed the maximum number of characters allowed in the field. In addition, any string or numeric literal passed to a function in Expression Builder must not exceed 75 characters. For more information about using Expression Builder, see Expression Builder (on page 845).

In addition:

- For all field types, including picklists, you can enter a constant value. For example:

  `Status (Task) = 'Not Started'`

- For Date fields, you can specify a number of days from today's date. For example:

  `Due Date (Fund Request) = Today() + 180`

- For an Owner field, you can specify a <record creator> (variable) or a specific user.

  No lookup is supported, you must type directly in the field.

You can also create complex expressions for default field values. You can enter an expression directly in the Default Value field, or click the *fx* icon to open the Expression Builder window, where you can enter an expression. For information about the syntax you can use for expressions, see Expression Builder (on page 845).

To use Expression Builder in field management, you must have the Advanced Field Management privilege in your user role. Users who have the Administrator role can enable this privilege for their own role and for other roles.

About Field Set-up and Page Layouts for Record Ownership Modes

Starting with Release 20, Oracle CRM On Demand provides three modes of record ownership for most of the record types that support books: user mode, book mode, and mixed mode. For existing companies that were created in Release 19 or earlier releases of Oracle CRM On Demand, user mode is the default record ownership mode for the record types that support the three modes of record ownership except for the Service Request record type, which is configured in mixed mode by default. For new companies, mixed mode is the

default record ownership mode for the record types that support the three modes of record ownership. For more information about record ownership modes, see About Record Ownership Modes (on page 346).

The record ownership mode for a record type is determined by the configuration of the Owner field and the Book field on the record type, and the page layouts for the record type must reflect the record ownership mode. The following table shows the configuration of the Owner field and the Book field for each of the record ownership modes. For information about setting up fields, see Creating and Editing Fields (on page 125).

Record Ownership Mode	Owner Field Set to Required	Book Field Set to Required	Other Configuration Details
User Mode	Yes	No	None.
Book Mode	No	Yes	(Optional) Set the Owner field to Read-Only.
Mixed Mode	No	No	None.

The following table shows the page layout information for each of the record ownership modes. For information about customising page layouts, see Customising Static Page Layouts (on page 165) and Specifying Dynamic Page Layouts (on page 213).

Record Ownership Mode	Page Layout Configuration
User Mode	The Owner field must be present and must be a required field on each of the Detail page layouts that are used for the record type. If the Book field is present on the Detail page layouts, then it must not be a required field.
Book Mode	The Book field must be present and must be a required field on each of the Detail page layouts that are used for the record type. If the Owner field is present on the Detail page layouts, then it must not be a required field.

Record Ownership Mode	Page Layout Configuration
Mixed Mode	The Detail page layouts for the record type can optionally contain the Owner field, or the Book field, or both. The Owner field and the Book field must not be required fields on the page layouts. **NOTE:** It is possible to specify either the Owner field or the Book field as a required field on a page layout for a record type, even if the record type is configured in mixed mode. If the Owner field is required, then the Owner field is blank by default when a user opens a New record page, but the user must select an owner for the record before saving the record. The Book field then shows the name of the user book for the record owner. If the Book field is required on the page layout, then the user must select a primary custom book before saving the record. However, if you want the record type to be fully in mixed mode, then do not specify either the Owner field or the Book field as a required field on any page layout for the record type.

About Custom Fields

Oracle CRM On Demand supplies the default fields that most organisations require. However, you might find fields in your existing records that do not have the corresponding fields in the records in Oracle CRM On Demand. In this case, you can create new fields, called *custom fields*, to support the unique needs of your company. This need might arise when you have existing records that you want to import into Oracle CRM On Demand.

Custom fields:

- Can be used in assignment rules, reports, filtered lists and targeted searches

  NOTE: For performance reasons, some custom fields cannot be used to sort lists. Web links and concatenated fields cannot be used in assignment rules, reports and targeted search. Maskable fields cannot be used in assignment rules, reports, or in expressions in Expression Builder. For more information on using custom fields in reports, see About Limitations in Analytics.

- Cannot be deleted
- Cannot be viewed until they are explicitly added to custom page layouts
- Are not inherited from one record type to another

  For example, a custom field that you added for leads is not automatically carried over to opportunities when that lead is converted to an opportunity.

  Custom fields for lead records must be mapped if you want them to be transferred when a lead is converted to an opportunity, account or contact.

- Cannot be viewed by other users until they sign in again
- Can be referenced by Web links, concatenated fields, Web services and other integration technologies

The following table shows you how many new fields you can add to Oracle CRM On Demand. In addition to these fields, you can also use optimised fields for certain record types. These optimised fields are listed in a separate table below. The data pertains to available fields for most record types; that is, you can add 100 new picklist fields for accounts, 100 for contacts, 100 for opportunities and so on. The maximum number of values (active or disabled) in a picklist is 1000.

You can create Note fields for the Contact, Service Request, Opportunity and Custom Object 01-40 record types. You can create a maximum of 3 custom Note fields for each of these record types. You can also create maskable fields for the Account, Contact, Portfolio, Financial Account and Household record types. You can create a maximum of 5 maskable fields for each of these record types. For more information, see About Maskable Fields.

NOTE: The Custom Object record types support custom related information fields. Custom related information fields that you create are counted towards the total number of fields of the relevant field type for the record type. For example, if you create a custom related information field of the Integer field type in the Custom Object 01 record type, then that field is one of the 35 fields of the Integer field type that you are allowed to create for the Custom Object 01 record type. For information about custom related information fields and how to create them, see About Custom Related Information Fields (on page 132) and Creating Custom Related Information Fields (on page 134).

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Account	35	80	25	35	35	10
Account Contact	35	25	25	35	35	0
Account Team	0	0	0	0	0	0
Business Plan Team	0	0	0	0	0	0
Contact	35	25	25	35	35	10
Contact Team	0	0	0	0	0	0
Lead	35	25	25	35	35	10
Lead Team	0	0	0	0	0	0
Opportunity	35	25	25	35	35	10
Opportunity Team	0	0	0	0	0	0
Activity	35	25	25	35	35	10
Campaign	35	25	25	35	35	0
Solution	35	25	25	35	35	0
Event	35	25	25	35	35	0

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Household	35	25	25	35	35	0
Funds	35	25	25	35	35	0
Portfolio	35	25	25	35	35	0
Vehicle	35	25	25	35	35	0
Service Request	35	25	25	35	35	10
Service Request Team	0	0	0	0	0	0
Programme	35	35	25	35	35	0
Custom Object 01	35	25	25	35	35	10
Custom Object 02	35	25	25	35	35	10
Custom Object 03	35	25	25	35	35	0
Dealer	35	25	25	35	35	10
Product	35	25	25	35	35	0
Asset	35	25	25	35	35	0
Fund Request	35	25	25	35	35	0
MDF Request	35	25	25	35	35	0
Partner	70	50	60	50	70	10
Revenue	35	25	25	35	35	0
SP Request	35	25	25	35	35	0
User	35	25	25	35	35	0
Deal Registration	35	25	25	35	35	0
Deal Registration Revenue Products	35	25	25	35	35	0
Course	35	25	25	35	35	0
Exam	35	25	25	35	35	0

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Certification	35	25	25	35	35	0
Accreditation	35	25	25	35	35	0
Custom Objects 04 and higher	35	25	25	35	35	0
Industry-specific record types other than those listed in this table	35	25	25	35	35	0
Contact Relationship	35	25	25	35	35	0
Invitee	35	25	25	35	35	0

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link Plus Concatenated Field
Account	33	30	20	100	30	70	100
Account Contact	63	0	20	100	30	60	100
Account Team	0	0	0	0	0	0	20
Business Plan Team	0	0	0	0	0	0	20
Contact	33	30	20	100	30	70	100
Contact Team	0	0	0	0	0	0	20
Lead	33	30	20	100	30	70	100
Lead Team	0	0	0	0	0	0	20
Opportunity	33	30	20	100	30	70	100
Activity	33	30	20	100	30	45	100
Campaign	35	30	20	100	30	70	100
Solution	33	30	20	100	30	46	100
Event	33	30	20	100	30	70	100
Household	35	30	20	100	30	70	100

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link Plus Concatenated Field
Funds	33	30	10	100	30	45	100
MDF Request	35	30	20	100	30	60	100
Portfolio	33	30	20	100	30	70	100
Vehicle	35	30	20	100	30	60	100
Service Request	33	30	20	100	30	45	100
Service Request Team	0	0	0	0	0	0	20
SP Request	35	30	20	100	30	60	100
Programme	35	30	20	100	30	60	100
Custom Object 01	35	30	20	100	30	60	100
Custom Object 02	35	30	20	100	30	60	100
Custom Object 03	35	30	20	100	30	60	100
Dealer	35	30	20	100	30	60	100
Product	33	30	10	100	30	45	100
Asset	33	30	20	100	30	70	100
Fund Request	33	30	20	100	30	70	100
Partner	68	60	30	200	60	105	100
Revenue	33	30	20	100	30	45	100
User	35	30	20	100	30	60	100
Deal Registration	35	30	20	100	30	60	100
Deal Registration Revenue Products	35	30	20	100	30	60	100
Course	35	30	20	100	30	60	100
Exam	35	30	20	100	30	60	100
Certification	35	30	20	100	30	60	100

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link Plus Concatenated Field
Accreditation	35	30	20	100	30	60	100
Custom Objects 04 and higher	35	30	20	100	30	60	100
Industry-specific record types other than those listed in this table	35	30	20	100	30	60	100
Contact Relationship	35	30	20	100	30	60	100
Invitee	35	30	20	100	30	60	98

In addition to the fields provided above, the following table shows the additional optimised fields that are available for the following record types in Oracle CRM On Demand. For more information on optimised fields, see Creating and Editing Fields (on page 125).

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Account	5	25	25	0	25	0
Account Team	35	25	25	25	35	0
Activity	5	25	25	0	25	0
Assessment	5	5	5	0	5	0
Business Plan Team	35	25	25	25	35	0
Campaign	5	5	5	0	5	0
Contact	5	25	25	0	25	0
Contact Team	35	25	25	25	35	0
Custom Objects 1-40	5	5	5	0	5	0
Division	35	25	25	35	35	0
Lead	5	5	5	0	5	0
Lead Team	35	25	25	25	35	0
Opportunity	5	25	25	0	25	0
Opportunity Team	35	25	25	25	35	0

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Product	5	5	5	0	5	0
Product Indication	35	25	25	35	35	0
Revenue	5	5	5	0	5	0
Service Request	5	25	25	0	25	0
Service Request Team	35	25	25	25	35	0

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link/ Concatenated Fields
Account	25	0	0	25	25	25	0
Account Team	35	25	25	50	25	50	0
Activity	25	0	0	25	25	25	0
Assessment	5	0	0	5	5	5	0
Business Plan Team	35	25	25	50	25	50	0
Campaign	5	0	0	5	5	5	0
Contact	25	0	0	25	25	25	0
Contact Team	35	25	25	50	25	50	0
Custom Objects 1-40	5	0	0	5	5	5	0
Division	35	30	20	100	30	60	0
Lead	5	0	0	5	5	5	0
Lead Team	35	25	25	50	25	50	0
Opportunity	25	0	0	25	25	25	0
Opportunity Team	35	25	25	50	25	50	0
Product	5	0	0	5	5	5	0
Product Indication	35	30	20	100	30	60	0

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link / Concatenated Fields
Revenue	5	0	0	5	5	5	0
Service Request	25	0	0	25	25	25	0
Service Request Team	35	25	25	50	25	50	0

Managing Obsolete Custom Fields

You cannot delete unused custom fields in Oracle CRM On Demand, however, you can do the following:

- Repurpose the custom fields
- Hide the custom fields by removing them from areas of Oracle CRM On Demand where they are used
- Mark the custom fields as unused

Repurposing Customs Fields

You can repurpose a custom field by renaming the field in Field Setup.

Before You Begin. To perform this procedure, the Can Read All Records setting must be selected for your user role.

To repurpose custom fields

1. Perform one of the following:
   a. Delete all old data containing obsolete fields using a Batch Delete or by using Web services.
   b. Use the Import Assistant to set the custom field to a null value.
2. In the upper right corner of any page, click the Admin global link.
3. In the Application Customisation section, click the Application Customisation link.
4. In the Record Types Set-up section, click the link for the required record type.
5. In the Field Management section, click *record type* Field Set-up.
6. Locate the custom field you require and click Edit.

7 Rename the custom field.

For more information on editing fields, see Creating and Editing Fields (on page 125).

8 Review and update areas of Oracle CRM On Demand in which the custom field occurred, for example in page layouts, search layouts, workflows, and so on.

Hiding Custom Fields

If there is no business requirement to repurpose an obsolete custom field, you can hide the field from end users by removing it from areas of Oracle CRM On Demand like page layouts, search layouts, workflows, and so on.

Marking Custom Fields as Not Used

You can edit custom field names to contain, for example, the words "Not Used". For example, if the custom field name is Contact Number, you can rename it to Contact Number – Not Used. This indicates that the custom field is no longer in use.

To mark custom fields as not used

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Record Types Set-up section, click the link for the required record type.

4 In the Field Management section, click *record type* Field Set-up.

5 Locate the custom field you require and click Edit.

6 Edit the custom field to indicate that it is not used.

For more information on editing fields, see Creating and Editing Fields (on page 125).

7 Review and update areas of Oracle CRM On Demand in which the custom field occurred, for example in page layouts, search layouts, workflows, and so on.

About Conditionally Required Fields

You can set up a field so that it is not required by default but becomes required when a defined condition is met. A field that is set up in this way is referred to as a *conditionally required field*. For example, you might decide that when a user sets the status of an opportunity to Lost, the user must select a value in the Reason Won/Lost field before saving the record. To implement this process, you can enter the following condition for the Reason Won/Lost field in field management:

```
[{Status}]=LookupValue("OPTY_STATUS", "Lost")
```

After you set up the field in this way, if a user selects the Lost status for an opportunity, then the user cannot save the opportunity until a value is selected in the Reason Won/Lost field. A red asterisk (*) displays beside the field, and if the label is displayed for the field, it is displayed in red text.

When setting up a conditionally required field, note the following points:

- You must make sure that the conditionally required field is displayed on the relevant page layouts. Otherwise, users will not be able to enter a value for the field when it becomes required. Similarly, it is recommended that you select the Always On Layout check box for the conditionally required field in the Page Layout Wizard, so that users cannot remove the field from their page layouts. If some users have already personalized their page layouts, then you might need to reset the personalised page layouts to the default layout after you set up the conditionally required field. For more information, see Resetting Personalised Page Layouts (on page 336).
- If you want a conditionally required field to always be required for a certain role, then you can make the field required in the page layout that is used for that role. The field is then required in all cases where that page layout is used, even if the condition that is defined for the field at field level is not met. Where other page layouts are used, the field is required only when the condition is met.

The following table explains the settings for making fields required or conditionally required in field management and in the Page Layout Wizard.

Required Check Box in Field Management	Conditionally Required Field in Field Management	Required Check Box in Page Layout Wizard	Conditionally Required Check Box in Page Layout Wizard	Outcome
Selected	Blank	Selected and read-only	Not selected and read-only	The field is always required.
Not selected	Contains an expression	Not selected and editable	Selected and read-only **NOTE:** If you select the Required check box in the Page Layout Wizard, then the Conditionally Required check box is automatically cleared.	The field is required only when the condition that is specified for the field is met, unless you select the Required check box in the Page Layout Wizard.
Not selected	Blank	Not selected and editable	Not selected and read-only	If you select the Required check box in the Page Layout Wizard, then the field is required in all cases where the page layout is used. Otherwise, the field is not required.

Expression Builder Functionality for Conditionally Required Fields

The following limitations apply to the Expression Builder functionality that you can use in the conditions that you create for conditionally required fields:

- **Functions.** The following Expression Builder functions only are supported:
  - FieldValue (on page 866)
  - FindNoneOf (on page 867)
  - FindOneOf (on page 868)
  - IfNull (on page 869)
  - IIf (on page 870)
  - InStr (on page 872)
  - Left (on page 880)
  - Len (on page 881)
  - LN (on page 882)
  - LookupName (on page 884)
  - LookupValue (on page 885)
  - Mid (on page 887)
  - Right (on page 891)
- **Data types.** You cannot use fields of the Date or Date Time field type in expressions for conditionally required fields. You can use all other field types that are supported for use in Expression Builder.
- **Operators.** No limitations apply.

For more information about using Expression Builder, see Expression Builder (on page 845).

Limitations When Editing Conditionally Required Fields

Administrators and users must consider the following limitations when editing conditionally required fields:

- The expression on a conditionally required field can include fields from associated records. For example, in the Contact Detail page you can have a field that is required only when a certain account is associated with the contact record. The expression can include the ID field or the Name field for the account as in the following examples:

  [{Account Id}]="1QA2-1IRPI7"

  [{Primary Account Name}]="ACME Computer Parts"

  When you make Web service or REST API calls to update the record, and the request includes the association, to ensure that the expression in the conditionally required field evaluates correctly, the request must contain the correct field from the associated record. In the contact example, either the ID or Name field, depending on what is configured for the conditionally required field, must be in the request. Alternatively, the request can contain both the ID field and Name field.
- The expression on a conditionally required field can evaluate read-only fields that are automatically updated when an association between two records is updated, such as the Account Location field on a contact record. However, such a configuration does not work correctly in the following circumstances:
  - If the conditionally required field is currently not required (that is, the expression on the field evaluates to false), and the record is edited inline on the record Detail page, and the update causes

the expression on the conditionally required field to evaluate to true. In this case, the conditionally required field continues to be not required.

- If the conditionally required field is currently required (that is, the expression on the field evaluates to true), and the record is edited in the record Edit page, and the update causes the expression on the conditionally required field to evaluate to false. In this case, the conditionally required field continues to be required.

- A conditionally required field can use an expression that evaluates custom related information fields. However, when the source field for a custom related information field is updated, there is a very short delay before the value in the custom related information field is automatically updated.

  So, if the expression on a conditionally required field evaluates a custom related information field, the expression might not be evaluated correctly immediately after the source field for the custom related information field is updated.

Creating and Editing Fields

You can create custom fields and edit existing field definitions in the Field Edit page for a record type, which you access from the *record type* Fields page. The *record type* Fields page shows the display name for each field, the field type, whether the field is required, and whether the copy enabled function is available for the field.

If your role includes the Upload Client Side Extensions and Manage Custom HTML Head Tag privilege, then the HTML Field Tag column is also displayed on the *record type* Fields page. This column shows the field names to be used in customised JavaScript code that performs operations on fields. For more information about developing such customised code, see Oracle CRM On Demand JavaScript API Developer's Guide.

The Integration Tag Web Services v2.0 column in the *record type* Fields page shows the integration tag for each field. These are the field names used in the WSDL files for Web Services v2.0. For more information about WSDL files, see Downloading WSDL and Schema Files (on page 790).

NOTE: For Custom Object record types and certain other record types, you can create custom related information fields. For these record types, the following fields are available on the Field Edit page: Related Information, Related Record Type, and Related Field. These fields on the Field Edit page 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 information about custom related information fields and how to create them, see About Custom Related Information Fields (on page 132) and Creating Custom Related Information Fields (on page 134).

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

To create custom fields and edit fields

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Set-up.

5 On the Fields page:

- Click New Field if you are creating a custom field.
- Click the Edit link for the field to edit the field's definition.

NOTE: If you have edited a standard field and want to reset all edited values to the default settings, click the Default button located beside the Save and Cancel buttons.

6 On the Field Edit page, enter a Display Name.

The display name is the label for the field.

7 On the Field Edit page, select a Field Type if you are creating a field.

CAUTION: The Field Type cannot be changed after you save the custom field.

The following rules apply to custom fields, which might differ from those applicable to default fields of the same field type:

Field Type	Maximum Length	Notes
Check Box	n/a	**NOTE:** Users are not compelled to select a field of type Checkbox that is marked as Required. If you want the check box field to have a value of True (that is, you want the check box to be selected), then you must use field validation rules on the check box field. For more information, see About Field Management (on page 106).
Date	25	
Date/Time	25	
Integer	10	Whole numbers ranging in value from -2147483647 to 2147483647.
Multi-select picklist		You cannot define a default value for a multi-select picklist.
Number	10	Numbers ranging in value from - 2147483648 to 2147483647.
Phone	35	
Picklist	30	A maximum of 1000 values can be defined for a picklist. However, only 300 of these values are available in the user interface. The total set of picklist values retrieved at run time is calculated based on the number of picklist values multiplied by the number of languages that are active at the company level. This number must not exceed 10000. For example, if there are 900 list of values and 12 active languages, then Oracle CRM On

Field Type	Maximum Length	Notes
		Demand cannot access this picklist because the combined list of retrieved values is 10800, which exceeds 10000. Although the maximum length for picklist values is 30, only the first 28 characters are used to determine whether an entered value is a duplicate of an existing value. **NOTE:** When defining picklist values, the picklist order for each language is independent. That is, when you define the picklist value order for one language, this order is not automatically duplicated if you translate the picklist into other languages. If you want to keep the picklist value order consistent for all languages, then you must manually set the correct order for all translations.
Text (Long)	255	Text fields use a single-line text field.
Text (Short)	40	Text fields use a single-line text field. However, different fields use different lengths.
Text (Short-Maskable)	40	Maskable fields allow you to hide some data in certain record types from some users. For example, if a maskable field contains the value 4558785236, then users see XXXX5236. For more information, see About Maskable Fields.
Web Link	n/a	Web Link custom fields allow you to create context-sensitive hyperlinks in your layouts. The Display Text field can contain up to 250 characters. The URL field can contain up to 8000 characters. Browsers have different maximum URL lengths. If you specify a URL that is too long, then it might not work as intended. The URL length changes if you are using parameter substitution. The combined total of Web links and concatenated fields that you can create varies with the record type, but for some record types the combined total is 100 Web links and concatenated fields. For more information about fields in Oracle CRM On Demand, see About Custom Fields (on page 114). For more information, see Setting Up Web Links (on page 138).

Field Type	Maximum Length	Notes
Concatenated Field	n/a	A *concatenated field* is a field that can display the values from multiple fields and can also display additional text. The combined total of Web links and concatenated fields that you can create varies with the record type, but for some record types the combined total is 100 Web links and concatenated fields. For more information about fields in Oracle CRM On Demand, see About Custom Fields (on page 114). You can set up concatenated fields for most record types. For more information, see Setting Up Concatenated Fields (on page 150).

8 (Optional) To indicate that the field name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

9 Click Save.

10 In the Additional Properties section, complete the following fields as required:

Field	Comments
Required	Select this check box to make the field a required field when creating or updating records. For example, you can require that all users fill in the Account field when adding new contacts. **NOTE:** Users are not compelled to select a field of type Checkbox that is marked as Required. If you want the check box field to have a value of True (that is, you want the check box to be selected), then you must use field validation rules on the check box field. For more information, see About Field Management (on page 106).
Conditionally Required	If you want the field to be required only when a defined condition is met, then enter an expression for the condition directly, or click the *fx* icon to open the Expression Builder window. **NOTE:** In field management, a field can be set up as required, or as conditionally required, but not both. So, if the Required check box is selected, then you cannot enter an expression in the Conditionally Required field. Some limitations apply to the Expression Builder functionality that you can use in the conditions for conditionally required fields. For more information about conditionally required fields and the limitations that apply to the Expression Builder functionality, see About Conditionally Required Fields (on page 122).
Default Value	Enter a value or an expression directly, or click the *fx* icon to open the

Field	Comments
	Expression Builder window. You can only add complex expressions if your role includes the Advanced Field Management privilege. This field can contain an expression up to a maximum of 1024 characters. If you create an expression to set a default value, then the result of the expression must not exceed the maximum number of characters allowed in the field. In addition, any string or numeric literal passed to a function in Expression Builder must not exceed 75 characters. If you enter the default value directly in this field, the number of characters in the default value must not exceed the maximum number of characters allowed for the field type. For number type fields, the value must be within the range of values for the field. For more information about setting default values, see About Field Management (on page 106). For information about the syntax that you can use with expressions, see Expression Builder (on page 845). **NOTE:** If you assign a default value to a maskable field, then the full default value is displayed in the field when a user creates a new record, even if the user's role does not include the View Masked Data privilege.
Read Only	Select this checkbox to make the field read-only.
Copy Enabled	Select this check box to allow this field to be copied when the record type is copied using the Copy Record button on the record detail page.
Optimised	This check box is automatically enabled when you select a field type for which optimised fields are available for that record type. The remaining number of available optimised fields is displayed to the right of the Optimised check box. You must select the Optimised check box if you require the optimised version of the field. **NOTE:** When the Optimised check box is selected for a field and saved, you cannot deselect it on the Edit page. However, you can rename the field, if you want to repurpose it.
Description	Enter additional information about the field.
Post Default	This field is only displayed if your user role includes the Advanced Field Management privilege. Select this checkbox if you require that the field is not automatically filled with the default value when a new record is created. The specified default value is only set when the record is saved if a value is not supplied by the user or by integration tools. **NOTE:** You cannot select Post Default for a check box field.
Field Validation	This field is only displayed if your user role includes the Advanced Field Management privilege.

Field	Comments
	Enter an expression directly, or, click the *fx* icon to open the Expression Builder window. This field can contain a maximum of 1024 characters. For more information about field validation, see About Field Management (on page 106), and for information about the syntax you can use for expressions, see Expression Builder (on page 845).
Field Validation Error Message	This field is only displayed if your user role includes the Advanced Field Management privilege. Enter a custom error message to be displayed in addition to the standard message if validation fails for the field. The message can contain only letters, numbers, spaces, commas, full stops and dashes. The following shows how the error messages are displayed, depending on whether you specify a custom error message: If field validation is set, and no custom message specified: The value entered for '[*Field*]' does not meet the validation rules set by your company administrator. The validation condition is '[*Rule*]' (*error code*). If field validation is set, and a custom message is specified: [*Custom Error Message*] (*error code*).

Field	Comments

Tooltip Display Format	This field is only displayed if your user role includes the Advanced Field Management privilege.
	
	Select HTML or Plain Text from the drop-down list to select the format in which your tooltip is displayed. The default value for this field is Plain Text.
	
	When using HTML formatted tooltips, performance is better if you avoid complex HTML and reduce the number of images displayed in the tooltip. Interactive controls, such as hyperlinks, are not supported. It is also recommended that you use padding when using HTML formatted tooltips to make the tooltip text easier to read. When you use the HTML tag <DIV>, it is recommended to use a border to ensure that the content in the <DIV> tag stays in the tooltip box. For example:
	
	`<div style="background-color:red;padding:3px 8px; border-radius:5px;">`
	
	`This is a tooltip message with padding and a red background.`
	
	`</div>`
	
	NOTE: For information about the considerations that apply to using customised code in Oracle CRM On Demand, see Important Considerations for Customers Using Customised Code in Oracle CRM On Demand (on page 235).

Tooltip Text	This field is only displayed if your user role includes the Advanced Field Management privilege. Enter information about the field's functionality. This information will be displayed as a ToolTip when the user moves the pointer over the field. This text field has a maximum of 1500 characters. **NOTE:** It is recommended that you use tooltips sparingly and that you keep tooltip text informative and concise.

11 Click Save.

The new fields that you add automatically appear in blue text and brackets in the other activated languages (regardless of the setting of the Mark for Translation checkbox).

12 To manually enter the translated equivalent of the new name, field validation error message, description, or ToolTip text, do the following:

a From the Translation Language drop-down list, select the language for which you want to enter a translation.

b Click the Edit link for the field whose name, field validation error message, description, or ToolTip text that you want to translate.

c Enter the translation in the Display Name, Field Validation Error Message, Description, or ToolTip Text field and click Save.

If you translated the name of the field, then the translated name appears in black text in the Display Name column.

d Repeat steps a through c for each language whose translation you want to enter.

e To continue working in the *record type* Fields page after you finish entering the translations, in the Language drop-down list, select the default language for your company.

NOTE: For custom fields to display in Analytics when the Oracle CRM On Demand user language differs from the language in which the custom field was created, the custom field must be translated in to the applicable language. For example, if a custom field is created in English, a German-language user sees this field in Analytics only if the field is translated in to German.

Selecting Mark for Translation overwrites both Display Name and Field Validation Error Message in all other languages.

13 If you created a picklist or multi-select picklist:

a Click the Edit Picklist link for the custom field.

b In the Picklist Values box, enter each value on a separate line.

c Save the record.

d (Optional) If your company uses picklist value groups, then map the picklist values to the picklist value groups, for more information, see Mapping Picklist Values to Picklist Value Groups (on page 160).

NOTE: Now you must expose newly-created custom fields so that they appear on the forms (Edit, Detail and Create forms). They do *not* appear by default. To expose the custom field, create new page layouts as required and make sure that these page layouts are assigned to each role that needs to view the field.

About Custom Related Information Fields

By using joined fields, Oracle CRM On Demand enables you to display some information from a related record of a given record type within the Detail page or related information lists of records of a second record type. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. For example, Custom Object 04 can be linked to the Contact record type, and a number of joined fields in the Custom Object 04 record type allow you to display information from contact records on the Detail page for custom object 04 records. You can display a contact's first name, last name, and email address, as well as other fields from a contact record on the Detail page of a linked custom object 04 record. Similarly, you can display the fields from the contact record in the lists of custom object 04 records that are linked to a record of another record type.

However, you might have a requirement to display the values from a field in a related record type for which a joined field is not available. For example, you might want to display the phone number of the related contact's assistant on the Detail page of the custom object 04 record, but a joined field is not available for the Assistant Phone # field in the Contact record type. Or, you might want to display the values from a custom field in the Contact record type in the list of custom object 04 records that appears on a Detail page for another linked record type, such as the Custom Object 05 record type. For the Custom Object record types and certain other

record types, you can create custom related information fields that enable you to display information from fields for which joined fields are not available. For information about creating custom related information fields, see Creating Custom Related Information Fields (on page 134).

NOTE: You can create custom related information fields for all types of fields except Web link, concatenated, maskable, and multiselect picklist fields. You cannot use a custom related information field in Oracle CRM On Demand reporting because these fields are not mapped in Analytics. Instead, you must use the original source field, which is available in Analytics.

About Updating Values in Custom Related Information Fields

The following considerations apply to updating values in custom related information fields:

- When you save a new custom related information field, Oracle CRM On Demand automatically submits a request to initialise the new field. The initialisation process populates the custom related information field on the records with the value of the corresponding field in the records of the related record type.
- After a custom related information field on a record is initialised, the value in the field is automatically updated each time that the value in the corresponding field on the related record is updated.
- The value in a custom related information field cannot be updated directly through any channel.

Example of Using Custom Related Information Fields

Your company owns and manages conference centres, and it provides conferencing facilities to other companies, government clients, and so on. You use a custom object record type to track information about events and another custom object record type to track information about the rooms that are used for the events. Each room is used for many events, and each event can use a number of rooms, so that you need a many-to-many relationship between the record types. To create the many-to-many relationship in Oracle CRM On Demand, you use a third custom object record type as an intersection table to track information about each room booking or session. You then create a one-to-many relationship between rooms and sessions, and a one-to-many relationship between events and sessions, which gives you a many-to-many relationship between rooms and events. For information about setting up many-to-many relationships between custom objects, see About Many-to-Many Relationships for Custom Objects (on page 266).

On the Room record type, you have two custom fields: Room Type and Room Capacity. You now want to display the information from the Room Type and Room Capacity fields in the Sessions related information section on the Event Detail page for certain user roles. This configuration enables users who view an Event Detail page to see the type and capacity of the rooms assigned to the event.

The following procedure describes how to configure the Event and Session record types in this example.

To configure the Event and Session record types

1. In the Application Customisation pages for the Session record type, create two custom related information fields to display the values from the Room Type and Room Capacity fields, which are in the Room record type.

   You can give the new fields on the Session record type the same names as the fields on the Room record type, or you can give them different names. For information about creating custom fields, see Creating Custom Related Information Fields (on page 134).

2 View the Related Field Initialisation Queue page to confirm that the initialisation request for the field completes successfully.

For more information, see Creating Custom Related Information Fields (on page 134).

3 In the Application Customisation pages for the Event record type, create or edit a related information layout for the Session record type, and move the custom fields that you created for the Session record type from the Available fields section to the Selected Fields section in the Related Information Layout wizard.

For information about configuring related information layouts, see Customising Related Item Layouts (on page 161).

4 In the Application Customisation pages for the Event record type, create or edit a layout for the Event Detail page, and assign the related information layout that you set up for the Session record type.

For information about configuring page layouts, see Customising Static Page Layouts (on page 165) and Specifying Dynamic Page Layouts (on page 213).

5 Assign the Event Detail page layout that you set up for the Event record type to each of the relevant user roles.

For information about configuring roles, see Adding Roles (on page 309).

6 If the roles are not already assigned to the users, then assign the roles to the appropriate users.

For information about configuring user records, see Setting Up Users (on page 271).

Creating Custom Related Information Fields

A *custom related information field* is a field on a given record type that you can use to display the values from a field in a related record type. You can add the custom related information fields that you create to page layouts and to related information layouts. For Custom Object record types and certain other record types, you can create custom related information fields. For an example of how to use custom related information fields, see About Custom Related Information Fields (on page 132).

The following record types support custom related information fields:

- Account
- Account Contact
- Activity
- Campaign
- Contact
- Contact Portfolio
- Custom Objects
- Household Contact
- Invitee
- Lead

- Opportunity
- Opportunity Product Revenue
- Partner
- Service Request
- Solution
- User

For custom related information fields, you configure only the following fields on the Field Edit page: Display Name, Related Information, Field Type, Related Record Type, ToolTip Text and Related Field. All other fields on the Field Edit page become read-only fields after you select the Related Information check box.

NOTE: After you save a custom related information field, you cannot update any of the fields on the Field Edit page for that custom related information field.

The following procedure describes how to create custom related information fields.

Before you begin:

- Determine the field type of the field in the related record type whose values you want to display in the custom related information field that you are creating.
- To perform this procedure, your role must include the Customise Application privilege.

To create a custom related information field

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click the link for the record type in which you want to set up the custom related information field.

   For example, if you want to create a custom related information field in the Custom Object 04 record type to display the values from a field in the Contact record type, then click Custom Object 04.
4. In the Field Management section, click *record type* Field Set-up.
5. On the *record type* Fields page, click New Field.
6. On the *record type* Field Edit page, do the following:

   a. In the Display Name field, enter the name of the new field.

      You might want to give the custom related information field the same name as the field on the related record type. However, you can give the fields different names.

   b. In the Field Type field, select the type of field that you want to create.

      For example, if you want the new field to display the values of a number field from the related record type, then select Number.

NOTE: You can create custom related information fields for all types of fields except Web link, concatenated, maskable, and multiselect picklist fields.

c Select the Related Information check box.

d In the Related Record Type field, select the related record type.

For example, if you are creating a custom related information field in the Custom Object 04 record type to display the values from a field in the Contact record type, then select Contact.

NOTE: After you select both the field type and the related record type, all of the fields of the selected field type in the selected related record type are available for selection in the field called Related Field.

e In the field called Related Field, select the name of the field whose information you want the new custom field to display.

f Save the new field.

7 (Optional) Enter a translation of the name of the new field, as follows:

a On the *record type* Fields page, from the Translation Language drop-down list, select the language whose translation you want to enter.

b Click the Edit link for the field whose name, field validation error message, description, or tooltip text you want to translate.

c Enter the translation in the Display Name field, and click Save.

The translated name appears in black text in the Display Name column.

d Repeat steps a through c for each language whose translation you want to enter.

e To continue working in the *record type* Fields page after you finish entering the translations, in the Language drop-down list, select the default language for your company.

When you save a new custom related information field, Oracle CRM On Demand automatically submits a request to initialise the new field. The initialisation process populates the custom related information field on the records with the value of the corresponding field in the records of the related record type. You can view the status of the initialisation request from the Related Field Initialisation Queue page, as described in the following procedure.

NOTE: Oracle CRM On Demand does not send email to confirm that the initialisation process has completed.

To view the status of an initialisation request

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

2 In the Data Management Tools section, click Related Field Initialisation Queue.

The Related Field Initialisation Queue page appears with information about the initialisation process.

You can add the new field to page layouts for the record type on which you created the field and to the record type's related information layouts for other record types. For example, if you create a custom related information field in the Custom Object 04 record type that displays the values from a field on the Contact record type, then you can add the custom related information field to page layouts for the Custom Object 04 record type and also to the related information layouts that are used to display custom object 04 records in the Detail pages for other record types, such as the Account record type, other Custom Object record types, and so on. For an example of using custom related fields in related information layouts, see About Custom Related Information Fields (on page 132).

Administering the Copy Enabled Setting

Most record types in Oracle CRM On Demand have a copy function; that is, users can copy the current record that they are using.

NOTE: When you use the Copy Record button, only the base record is copied, but not the related item child records.

The following restrictions apply when using the copy function:

- Web links, concatenated fields, system fields, address fields, maskable fields, calculated and reference fields cannot be copied. The Copy Enabled check box is unavailable for these items.
- Read-only fields cannot be copied. Read-only fields are fields that were set as read-only in the field setup or in fields layout.
- Fields that are unavailable on a user's form layout cannot be copied.

This topic describes how to specify which fields you can copy by using the Copy button in record detail pages in Oracle CRM On Demand.

To specify which fields can be copied using the Copy button

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Setup section, click the record type for which you want to enable the copy function.
4. In the Field Management section, click the setup link for the record type field.

   A list of the fields for the specified record type field is displayed.
5. Find the field that you want to edit, and click the Edit link.

   NOTE: If you want to copy associations, you must select the association picklist and not the association ID. All fields related to this association are automatically copied when the association picklist is set to Copy Enabled.
6. Select the Copy Enabled check box.
7. Click Save.

   These changes take effect the next time that the user logs in to Oracle CRM On Demand.

Setting Up Custom Field Integration Tags

Integration tags for custom fields are language-independent symbolic identifiers that are assigned to every custom field. These tags are used by Web Services (used when generating WSDL files) and Web Link custom field parameters. These tags allow an administrator to set a meaningful integration name for each custom field. This name is used by integration components so that the label names can be changed without affecting existing integrations. Integration tags are displayed in the Integration Tag Web Services v2.0 column in the *record type* Fields page.

Expression Builder uses integration tags. So, they are also used when creating workflow rules and fields. For more information about workflow rules, see Creating Workflow Rules (on page 446). For more information about creating and editing fields, see Creating and Editing Fields (on page 125).

CAUTION: Do not change integration tags after they are set up. If you do, you risk losing any technologies that reference the integration tags.

To set the integration tag for a custom field

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Set-up.
5. On the *record type* Fields page, click Manage Field Labels.
6. On the Manage Field Labels page, click the Advanced button.
7. Update the Integration Tag.

   NOTE: Fields are only displayed on the Advanced Setup page when there is one or more custom fields for the record type.

TIP: For the Integration Tag, use a short, descriptive name that easily identifies this custom field. This tag is referenced by Web Services, Web links and other integration technologies (WSDL files for Web Services and URL Parameters for Web Links).

Setting Up Web Links

A *Web link* is a custom field that allows you to place a hyperlink to an external Web site or Web-based application in a record in Oracle CRM On Demand. You can use a Web link custom field to provide a convenient way for users to navigate to another Web page, including another page in Oracle CRM On Demand. You can create Web link custom fields for any record type. For example, you might define a Web link field for the account record type that updates the account details with values from another application. As with other custom fields, you must add Web Link fields to your record page layouts to make them visible to your users.

You can configure a Web link to simply open another Web site. You can also configure the Web link to pass specific information from the Oracle CRM On Demand record as a parameter in the URL. For example, you might create a Web link field to pass address information from an account record to a Web site that provides address-specific maps. Then, when the user clicks the Web link on the account record, a map for your account location is opened.

You can also configure a Web link to open a report or a dashboard.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 142).

You can configure the Web link to appear only in certain circumstances. For example, you can specify the conditions that must be met before the Web link is displayed, and you can configure the link to appear only on the Detail pages to prevent users from clicking the link from the Edit pages.

NOTE: The contents of the Web link fields cannot be carried over to the new records when a lead is converted.

Before you begin. To configure Web Link fields, you must be familiar with the syntax of the target URL. To configure a Web link to open a report or dashboard, the report or dashboard must be stored under Shared Folders, in a folder to which you have access.

To set up the Web link

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Set-up.
5. If the Web link field does not already exist, create a custom Web link field as described in Creating and Editing Fields (on page 125).
6. On the Fields page, click the Edit Web Link for the custom field.
7. On the Edit Web Link page, complete the following properties where applicable:

   a. **Field Display Name.** This field is read-only.

   b. **Type.** Select one of the following:

      - **URL.** Select this value if you want to create a Web link to another Web page, including another page in Oracle CRM On Demand.
      - **Report.** Select this value if you want to create a Web link to a report.
      - **Dashboard.** Select this value if you want to create a Web link to a dashboard.

   c. **User and System Fields.** When you create the Web link, this field automatically displays information pertaining to the user and company.

      For more information, see User and System Fields (on page 145).

d *Record Type* **Fields.** When you create the Web link, this field automatically displays information pertaining to the record type.

NOTE: *Record Type* refers to the record type for which you are setting up the Web link. For example, if you are editing a Web link for a contact record, this field appears as the Contacts Fields list.

e **Functions.** (URL Web link type only) Select EncodeURL from the picklist if your Oracle CRM On Demand URL requires further encoding to display it correctly.

f **Mark for Translation.** Select this check box if you want this Web link to appear in other activated languages.

8 In the Windows Properties section, enter the following properties:

a For Display Text, enter the label (display name) for the hyperlink, which the user sees in the layout.

Example: Click Here for Stock Ticker (underlined).

You can also include context-sensitive parameters in the Display Text field by placing the cursor in the Display Text field, and then selecting the User and System Fields or (Record Type) Fields list. A field parameter is placed in the Display Text field (designated by %%%fieldname%%%), which is replaced by the field value based on the current record.

NOTE: If your display text is too long to fit in the layout, it is truncated. Also, the information for any variables is added at run time.

b Select how you want Oracle CRM On Demand to behave when a user clicks the hyperlink:

- **Open in Current window.** Opens the hyperlinked page in the current window, replacing the current Oracle CRM On Demand session.
- **Open in Custom Web Tab.** Opens the hyperlinked page in a custom Web tab. Select the required Web tab from the Target Custom Web Tab list.
- **Open in New window.** Opens the hyperlinked page in a new window, leaving the current Oracle CRM On Demand window unchanged. Select the Parent Window Refresh check box if you want to refresh the parent window after the user closes the new window.

c For Display Options, select Detail Page, Edit Page, or Both, depending on whether you want the Web link to appear on Detail pages only, Edit pages only, or both Detail and Edit pages. You can add Web links to a List page and to a related information section. For more information, see Managing List Access and List Order (on page 201) and Customising Related Item Layouts (on page 161).

9 Fill in the Link Properties:

a For Active Link Condition, enter an expression for a condition that controls whether the Web link is active on the Detail and Edit pages. You can click the fx icon next to the Active Link Condition field to open the Expression Builder window in which you can enter an expression. For information about the syntax that you can use for expressions, see Expression Builder (on page 845).

For example, if you enter an expression like [Revenue] > 10000, the Web link is active only if the condition, Revenue value greater than 10000, is met.

If you do not enter an expression, the Web link is always active. If you enter an expression, and the condition is not met, the Web link is still displayed, but it is not active.

b For Display Link Condition, enter an expression for a condition that controls whether the Web link is visible on the Detail and Edit pages.

For example, if you enter an expression like [Revenue] > 10000, the Web link is displayed only if the condition, Revenue value greater than 10000, is met.

If you do not enter an expression, the Web link is always displayed.

The following applies to the expressions in the Display Link Condition, and Active Link Condition fields.

- **New page.** The visible and active expressions are not evaluated for new pages. They are set to TRUE by default. The only way to disable the link is to make the expression explicitly FALSE.
- **Edit page.** The visible and active expressions are set to TRUE by default. However, you can use the Expression Builder to add a new expression.

c (Report and Dashboard Web link types only) In the Path field, click the Lookup icon (magnifying glass), then navigate to the report or dashboard you require in Shared Folders, and then click OK. The Path field is automatically populated after you select the report or dashboard.

d (Report and Dashboard Web link types only) If you want to specify filters that will be applied to the report at run time, then specify the filters in the Parameters field. For detailed information about specifying the filters, see About Specifying Filters for Embedded Reports and Dashboards.

e (URL Web link type only) For URL, enter the URL that is invoked when the user clicks the hyperlink, such as www.oracle.com.

NOTE: You can also include context-sensitive parameters by placing the cursor in the URL field, and then selecting the User and System Fields or (Record Type) Fields list. A field parameter is placed in the URL (designated by %%%fieldname%%%), which is replaced by the field value based on the current record when the user clicks the value.

If you do not specify a URL, the user is directed to a void URL when the link is clicked.

Each browser has a maximum URL length. If you specify a URL that exceeds this length, then users might see indeterminate behaviour on the browser when they click the Web link. Make sure that the URL that you specify is a valid uniform resource identifier (URI). If it is not valid, then an error message is displayed instead of the link.

NOTE: Although it is possible to use a URL to embed a report or dashboard in a custom Web applet, Web tab, or Web link of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade.

f (URL Web link type only) For Request Method, select the method with which you want to send your Web link request:

- **GET.** A GET request sends query string parameters (name and value pairs) in the request URL. This is the default value for existing Web links.
- **POST.** A POST request sends query string parameters (name and value pairs) in the HTTP message body. This is the default value for new Web links.

10 For user and system fields, select an option from the User and System Fields list to add parameter fields to the URL, Display Text, or Parameters field at the current position of the cursor.

For example, if you choose User id from the list, %%%User id%%% is inserted into the URL field, or the Display Text field, or the Parameters field, depending on where your cursor is positioned. At run

time, %%%User id%%% is replaced with the user ID of the user who is logged in. As another example, if you choose Host Name from the list, %%%Hostname%%% is inserted at the cursor position. At run-time, this parameter is replaced with the host name of the server where Oracle CRM On Demand is running. This is useful in configurations containing a URL to Oracle CRM On Demand as it is no longer necessary to manually modify the Oracle CRM On Demand host name when migrating from one environment to another.

11 For *record type* fields, place your cursor in the URL, Display Text, or Parameters field where you want to add a parameter, and then select the field that you want to include from the list.

For example, if you select the field Row id, %%%Row id%%% is inserted into the URL field, or the Display Text field, or the Parameters field, depending on where your cursor is positioned. At run time, this parameter is replaced with the row ID of the current record.

NOTE: A placeholder for the name of a record type is indicated by the words, *record type*, in italics. For example, *record type* refers to the record type where you add the Web link custom field. For example, if you are editing a Web link for a contact record, this field appears as the Contacts Fields list.

12 Click Save.

13 Add the Web link field to the *record type* page layout, as described in Customising Static Page Layouts (on page 165).

About Embedding Reports and Dashboards in Oracle CRM On Demand

You can embed reports from the Analytics catalogue in any of the following locations:

- Custom Web applets of the Report type, for record-type Detail page and Homepages. See Creating Web Applets for Record Types (on page 177) and Creating Report Web Applets (on page 187).
- Global Web applets of the Report type, for My Homepage and the Action bar. See Creating Global Web Applets (on page 234) and Creating Report Web Applets (on page 187).
- Custom Web tabs of the Report type. See Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 224).
- Custom Web links of the Report type. See Setting Up Web Links (on page 138).
- My Homepage and record-type Homepages, using the Homepage Custom Report features. See Enabling Custom Reports in My Homepage (on page 244) and Creating Homepage Custom Reports (on page 202).

You can embed dashboards from the Analytics catalogue in any of the following locations:

- Custom Web applets of the Dashboard type, for record-type Detail page and Homepages. See Creating Web Applets for Record Types (on page 177) and Creating Dashboard Web Applets (on page 188).
- Global Web applets of the Dashboard type, for My Homepage and the Action bar. See Creating Global Web Applets (on page 234) and Creating Dashboard Web Applets (on page 188).
- Custom Web tabs of the Dashboard type. See Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 224).
- Custom Web links of the Dashboard type. See Setting Up Web Links (on page 138).

To embed a report or dashboard from the Analytics catalogue, the report or dashboard must be stored under Shared Folders, and you must have access to the folder where the report or dashboard is located.

NOTE: Although it is possible to use a URL to embed a report or dashboard in a custom Web applet, Web tab, or Web link of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade.

About Specifying Filters for Embedded Reports and Dashboards

You can embed reports and dashboards in custom Web applet and Web tabs. You can also configure Web link fields to open reports and dashboards.

When you create a custom Web applet, Web tab, or Web link of the Report or Dashboard type, you can specify filters that will be applied at run time. For a dashboard, the filters that you specify apply to all of the reports in the dashboard. You can specify a maximum of six filters for a report or dashboard.

NOTE: The columns that you specify in the filters must be included in the report, and the filter on the columns must be set to "is prompted". Otherwise, the filter that you specify in the Web applet, Web tab, or Web link will not be applied when the report is run.

P0 Parameter

In the P0 parameter, at the start of the parameter string, you specify the number of filters that you want to set up. The valid values for the P0 parameter are 1 through 6. The P0 parameter can be used only once in the parameter string.

Filter Parameters

Each filter uses three parameters: operator, column, and value, and the parameters must be specified in that order. You specify the first filter in parameters P1-P3, and the subsequent filters in sets of three parameters, namely P4-P6, P7-P9, P10-P12, P13-P15, and P16-P18. You must use an ampersand (&) to separate the parameters. Each parameter can be used only once in the parameter string.

Syntax

For a single filter, the syntax is as follows:

P0=1&P1=*operator*&P2=*column*&P3=*value*

To specify additional filters, you add parameters P4-P6, P7-P9, and so on, and increase the value of the P0 parameter to match the number of filters that you add. So, for two filters, the syntax is as follows:

P0=2&P1=*operator*&P2=*column*&P3=*value*&P4=*operator*&P5=*column*&P6=*value*

The following sections describe the operator, column, and value parameters that make up a filter.

Operator

The operator is specified in the first of the three parameters for a filter. The following table lists the operators that you can use.

Operator	Description
eq	Equal to or in
neq	Not equal to or not in
lt	Less than
gt	Greater than
ge	Greater than or equal to
le	Less than or equal to
bwith	Begins with
ewith	Ends with
cany	Contains any. The value parameter can have multiple values, each separated with a plus sign (+), and you must specify the number of values. For example, to find Sales Regions 1, 3, and 5 (that is, three regions): `&P1=cany&P2=Sales.Region&P3=3+1+3+5`
call	Contains all. The value parameter can have multiple values, each separated with a plus sign (+), and you must specify the number of values.
like	Like. The value parameter must contain a value and the value string must end with the wildcard % (percent sign). For example, to find account names that are like Acme: `&P1=like&P2=Account.Name&P3=Acme%`
top	Top *n* items. For example, to find the top 6 sales revenues: `&P1=top&P2=Sales.Revenue&P3=6`
bottom	Bottom *n* items. For example, to find the bottom 4 sales revenues: `&P1=bottom&P2=Sales.Revenue&P3=4`
bet	Between. The value parameter must have two values, separated by a plus sign (+), and you must specify the number of values. For example, to filter on Sales Region between 3 and 7, use: `&P1=bet&P2=Sales.Region&P3=2+3+7`
null	Is null. The value parameter must be 0 (zero), or be omitted.

Operator	Description
null	Is not null. The value parameter must be 0 (zero), or be omitted.

Column

The column that is to be filtered is specified in the second of the three parameters for a filter. When specifying the column, note the following points:

- You must specify the table name and the column name, separated by a period (.) as shown in the following example, where the Name field from the Account table is specified:

  ```
  Account.Name
  ```

- If the table name or the column name contains a space, then you must enclose the name in double quotation marks, as shown in the following example:

  ```
  "Activity Metrics"."# of Activities"
  ```

- You must use the original column names, and not the display names.

Value

The value is specified in the third of the three parameters for a filter. You can specify a value directly, or you can specify a field as a parameter, as follows:

- To include a user or system field in a filter parameter, place your cursor in the Parameters field at the position where you want to add the parameter, and then select the field that you want to include from the User and System Fields list.

  For information about the user and system fields that you can use in the parameters, see User and System Fields.

- (Web applets for record-type Detail pages only, and Web links) To include a field from the record type in a filter parameter, place your cursor in the Parameters field at the position where you want to add the field, and then select the field from the *record type* Fields list, where *record type* is the name of the record type for which you are creating the applet.

For example, if you select the Row Id field from the *record type* Fields list, then %%%Row_Id%%% is inserted. At run time, %%%Row_Id%%% is replaced with the row ID of the current record.

NOTE: The URL for a report or dashboard is generated at run time. The length of the URL for the report or dashboard varies, depending on the values that are passed to the URL for the report filters at run time. Each browser has a maximum URL length. If the URL for a report or dashboard exceeds this length, then users might see indeterminate behaviour on the browser when they attempt to view that report or dashboard.

User and System Fields

The following table describes the various user and system fields that you can use as parameters in custom Web links, concatenated fields, custom Web applets, and custom Web tabs.

Field	Description
Animation Flag	Determines whether the display of notes in the Message Centre and record Detail pages is animated.
Business Unit	The company's business unit.
Calendar Week Start Day	Start day of the calendar week for the logged in user.
Comm Completed Date Filter	The period during which the Communication Homepage displays recently completed activities for the user, for example, Last Month, Last Day, and so on.
Comm Inbox Date Filter	The period during which the Communication Homepage Inbox displays activities for the logged in user, for example, Last Month, Last Day, and so on.
Company Language Code	The three-letter code for the user's company language. The codes for each language are listed in an appendix in Oracle Migration Tool On Demand Guide.
Company Location	The company location.
Company Name	The company name.
Default Calendar View	The calendar view for the logged in user, which is displayed each time you click the Calendar tab.
Default Search Object	The record type that appears in the search picklist in the Action bar when the user signs in to Oracle CRM On Demand.
Host Name	The host name of the server where Oracle CRM On Demand is running.
HUD Mode	Determines whether the user sees links for the related information sections on a Detail page at the bottom of the browser window.
Number of Security Questions	The number of security questions required for the the logged in user's organization.
Preview Mode	The record preview mode of the logged in user.
Primary Division ID	The primary division ID associated with the logged in user.
Primary Division Name	The primary division name associated with the logged in user.
Primary Group Name	The name of the group to which the logged in user has been added.
Primary Organisation ID	The primary organization ID of the logged in user.
Primary Position ID	The primary position ID of the logged in user.
Prompt to Dial Flag	Determines whether the user is prompted with a Click-to-Dial window on clicking a phone number link in the Detail or List pages.
Related Information Format	The format of the related information sections on record Detail pages, for example, lists, tabs.

Field	Description
Sales Method ID	The sales method ID of the logged in user.
SSO Token	The authentication information that is required to access the company's Single Sign-On (SSO) portal.
Theme ID	The theme that is used when the user signs in to Oracle CRM On Demand.
User Alias	The alias of the logged in user.
User Authentication Type	The type of authentication when the user logs in to Oracle CRM On Demand, for example, User ID/Password Only, Single Sign-On Only.
User Country	The country name of the logged in use.
User Currency Code	The three-letter code for the user's currency.
User First Name	The first name of the logged in user.
User Full Name	The full name of the logged in user.
User Email	The email address of the user who is logged in.
User ID	The user sign in ID of the user who is logged in.
User Language Code	The three-letter code for the user's language. The codes for each language are listed in an appendix in Oracle Migration Tool On Demand Guide.
User Last Logged In	The last log in time of the logged in user.
User Last Name	The last name of the logged in user.
User Locale Code	The three-letter code for the user's locale. You can see which locales are supported in the Locale field in the User Detail page. For more information, see the Supported User Locale Codes in Oracle CRM On Demand table in this topic.
User Password Flag	Determines whether the logged in user’s password is temporary.
User Row ID	The row ID of the logged in user.
User Timezone ID	The timezone ID of the logged in user.
Welcome Flag	indicates whether the Oracle CRM On Demand Welcome Page appears each time the user signs in to Oracle CRM On Demand.
XSS action code	The behaviour of the cross-site scripting (XSS) protection available for the logged in user's company, for example, Block, Correct, and so on.

Supported User Locale Codes in Oracle CRM On Demand

The following table lists the locales and user locale codes.

Locale	User Locale Code
Chinese - Hong Kong SAR	ZHH
Chinese - PRC	CHS
Chinese - Singapore	ZHI
Chinese - Taiwan	CHT
Czech - Czech Republic	CSY
Danish - Denmark	DAN
Dutch - Belgium	NLB
Dutch - Netherlands	NLD
English - Australia	ENA
English - Canada	ENC
English - India	ENN
English - Ireland	ENI
English - New Zealand	ENZ
English - Philippines	ENP
English - South Africa	ENS
English - United Kingdom	ENG
English - United States	ENU
Finnish - Finland	FIN
French - Belgium	FRB
French - Canada	FRC
French - France	FRA
French - Luxembourg	FRL
French - Switzerland	FRS
German - Austria	DEA
German - Germany	DEU
German - Luxembourg	DEL

Locale	User Locale Code
German - Switzerland	DES
Greek - Greece	ELL
Hungarian - Hungary	HUN
Indonesian - Indonesia	IND
Italian - Italy	ITA
Japanese - Japan	JPN
Korean - Korea	KOR
Malay - Malaysia	MSL
Norwegian - Bokmål	NOR
Polish - Poland	PLK
Portuguese - Brazil	PTB
Portuguese - Portugal	PTG
Romanian – Romania	ROU
Russian - Russia	RUS
Slovak - Slovakia	SVK
Spanish - Chile	ESL
Spanish - Mexico	ESM
Spanish - Spain	ESN
Swedish - Sweden	SVE
Thai - Thailand	THA
Turkish - Turkey	TRK

About Using Web Links to Create New Integration Scenarios

Adding Web link custom fields to Oracle CRM On Demand provides many new integration opportunities. You can create an integration, based on the user interface, to on premise and external systems that allow users to navigate directly to content from Oracle CRM On Demand.

Some examples include:

- Create a link to a financial Web site based on the account ticker symbol that brings up a stock chart for the account.

- Create a link to an internal system that uses Web Services and creates a composite view of data from multiple on-premise and hosted solutions relevant to the current account.

NOTE: Although it is possible to use a URL to embed a report or dashboard in a custom Web applet, Web tab, or Web link of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade.For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 142).

For step-by-step instructions on how to create Web links, see Setting Up Web Links (on page 138).

Setting Up Concatenated Fields

A *concatenated field* is a field that can display the values from multiple fields and can also display additional text. You set up concatenated fields when you want to combine values from a number of individual fields and you want to display this information on record Detail pages, Edit pages, related information sections and lists. For more information on concatenated fields, see About Concatenated Fields.

To set up concatenated fields in Oracle CRM On Demand, complete the steps in the following procedure. For more information on restrictions when using concatenated fields, see Restrictions When Using Concatenated Fields (on page 151).

To set up a concatenated field

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Set-up.
5. If the concatenated field does not already exist, then create a concatenated field.

   For more information, see Creating and Editing Fields (on page 125).
6. On the Fields page, click the Edit Fields link for the concatenated field.
7. On the Edit Fields page, complete the following fields where applicable:

   a. **Field Display Name.** This field is read-only.

   b. **User and System Fields.** Select an option from the User and System Fields list to add parameter fields to the Display Text field at the current position of the cursor.

      For example, if you choose User id from the list, then %%%User id%%% is inserted into the Display Text field, depending on where your cursor is positioned. At run time, this parameter is replaced with the user ID of the user who is logged in.

      For more information, see User and System Fields (on page 145).

   c. *Record Type* **Fields.** Place your cursor in the Display Text field where you want to add a field and then select the field that you want to include from the list.

For example, if you select the field Row id, then %%%Row id%%% is inserted into the Display Text field, depending on where your cursor is positioned. At run time, this parameter is replaced with the row ID of the current record.

NOTE: *Record Type* refers to the record type for which you are setting up the concatenated field. For example, if you are editing a concatenated field for a contact record, this field appears as the Contacts Fields list.

d **Mark for Translation.** Select this check box if you want this concatenated field to appear in other activated languages.

e **Display Text.** Shows the fields and additional text that make up the concatenated field. In the Display Text field, you can specify the fields for the record type, user and system fields and additional text.

For example, if you want to set up a concatenated field that is based on the Job Title and Age fields, then you can select Job Title from *Record Type* Fields, type the text ", aged", and select Age from *Record Type* Fields. The following text is then shown in the Display Text field:

%%%*Job Title*%%%, aged %%%*Age*%%%

Then, for example, the following might be displayed in the concatenated field:

Manager, aged 41

You can use the Enter key in the Display Text field to specify that text and fields appear on separate lines in the concatenated field.

NOTE: If your display text is too long to fit in the layout, then it is truncated. The Display Text field can contain up to 250 characters.

8 Click Save.

9 Add the concatenated field to the Detail page.

For more information, see Customising Static Page Layouts (on page 165).

Related Topics

See the following topics for related information:

- About Concatenated Fields
- Restrictions When Using Concatenated Fields (on page 151)
- Customising Static Page Layouts (on page 165)

Restrictions When Using Concatenated Fields

The following restrictions apply when using concatenated fields:

- Concatenated fields support only the following field types:
  - Address
  - Currency

- Date/Date Time
- Integer
- Number
- Percent
- Picklist
- Text (Long)
- Text (Short)

  NOTE: The Sales Stage field is not a true picklist field. Concatenated fields are not supported on this type of picklist.

- The combined total of Web links and concatenated fields that you can create varies with the record type, but for some record types the combined total is 100 Web links and concatenated fields. For more information about fields in Oracle CRM On Demand, see About Custom Fields (on page 114).
- Concatenated fields cannot be updated through Update Values workflow actions, and cannot be included in integration events. Instead, you must use the individual fields that make up the concatenated fields.
- You cannot import or export concatenated fields in Oracle CRM On Demand. However, you can import and export the individual fields that make up the concatenated fields.
- When setting up a concatenated field with an address field, the following conditions apply:
  - You can add individual fields from an address, or more than one address, to a concatenated field.
  - Only the address fields that you add to the concatenated field appear in the concatenated field. However, when a user updates that concatenated field, the user can edit all of the fields in the relevant address templates, not just the address fields that appear in the concatenated field, unless the field is from a shared address. If an address field in a concatenated field is from a shared address on an account, contact, dealer, or partner record, then the user cannot edit the fields within the address. Instead, the user can select a different address.
- When setting up a concatenated field with a cascading picklist, all the picklists associated with the cascading picklist must be added to the concatenated field. If you do not add all the picklists, then they remain read-only, and cannot be edited.

Related Topics

See the following topics for related information:

- About Concatenated Fields
- Setting Up Concatenated Fields (on page 150)
- Customising Static Page Layouts (on page 165)

Managing Field Labels

To use terminology that is familiar to your employees, you can change field names. For example, you can change the Account Name field label to Company Name. You can also replace your field label with an icon.

NOTE: It can take 30-60 minutes for the new field display names to appear in reports and analytics.

Before you begin. To perform this procedure, your role must include the Customise Application privilege. The Display Type and Icon menu are unavailable if the translation language is different to your user language. For more information on translating fields, see Creating and Editing Fields (on page 125).

To rename a field

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the link for the required record type.
4. In the Field Management section, click the required Field Set-up link.
5. In the *record type* Fields page, click Manage Field Labels.
6. To change the field name, do the following:
   a. In the Manage Fields Labels page, select Text Only from the Display Type menu.
   b. Enter the new field name in the Display Name field.
7. To use an icon instead of a field label, do the following:
   a. In the Manage Fields Labels page, select Icon Only from the Display Type menu.
   b. (Optional) To select an icon other than the default icon, click the Lookup icon (magnifying glass) and select an icon.

   NOTE: If you select None from the Display Type menu, then no field name or icon is displayed in the record type Detail page.
8. (Optional) To indicate that an updated name needs to be translated into other languages activated for your company, select the Mark for Translation checkbox.

   NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation checkbox. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text within brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

   Selecting the Mark for Translation checkbox also causes the Field Validation Error Message (from the Field Edit page) to be marked for translation if the error message exists. The Field Validation Error Message field is only visible for users whose role includes the Advanced Field Management privilege.
9. To manually enter the translated equivalent of the new name:
   a. From the Translation Language drop-down list, select the language for which you want to enter a translation.

b Enter the translated equivalent in the appropriate Display Name field and click Save.

c Click the link to return to the Fields page you just updated and select the language again, if necessary.

The translated name appears in black text in the Display Name column.

10 Click Save.

Related Topics

See the following topics for related information:

- About Field Management (on page 106)
- Creating and Editing Fields (on page 125)

Using Indexed Custom Fields

To optimise the performance of Oracle CRM On Demand, you can use custom fields that have been optimised for specific record types. These optimised fields, which are called *indexed custom fields,* are special fields that improve the response time during a search or when sorting a particular list. Indexed custom fields are preconfigured in the Oracle CRM On Demand database. You can change the labels on the indexed custom fields, but you cannot change the integration tags.

NOTE: You can choose to migrate your data from a custom field to an indexed custom field to increase the performance of lists for users. To migrate the existing data to the available record types, use the export and import functionality of Oracle CRM On Demand or Web services. For more information about exporting and importing data, see Import and Export Tools (on page 558). For more information about Web services, see Web Services Integration (on page 790).

Indexed custom fields are prefixed with the word, *Indexed,* by default. The following record types do not support indexed custom fields:

- Assessment
- Book
- User

The following table lists the record types that support indexed custom fields:

- Account
- Account Team
- Activity
- Address (for account, contact, dealer and partners).

  NOTE: There are restrictions to picklist customisation for address records. See *About Picklist Customisation in Address Records*.
- Appointment Contact
- Appointment, Task, and Call
- Appointment User

- Asset

  NOTE: The Portfolio and Asset record types share the same IndexPicklist fields. When you add, edit, or delete any value in one record type, the same action occurs in the other record type.

- Campaign
- Campaign Recipient
- Call Product Detail
- Call Promotional Items Dropped
- Contact
- Contact Best Times
- Contact Team
- Custom Objects 1-3
- Dealer
- Event
- Fund
- Fund Request
- Household
- Lead
- Note
- Opportunity
- Opportunity Contact Role
- Opportunity Product Revenue
- Partner Program
- Portfolio

  NOTE: The Portfolio and Asset record types share the same IndexPicklist fields. When you add, edit, or delete any value in one record type, the same action occurs in the other record type.

- Product Category
- Service Request
- Solution
- Task Contact
- Task User
- User
- Vehicle
- Vehicle Contact
- Vehicle Sales History

- Vehicle Service History

Each record type in the table has the following indexed custom fields:

- Indexed Checkbox
- Indexed Currency
- Indexed Date
- Indexed Number
- Indexed Picklist 1
- Indexed Picklist 2
- Indexed Picklist 3
- Indexed Picklist 4
- Indexed Picklist 5
- Indexed Picklist 6
- Indexed Long Text
- Indexed Short Text 1
- Indexed Short Text 2

All other record types in Oracle CRM On Demand have the following indexed custom fields:

- Indexed Number
- Indexed Date
- Indexed Checkbox
- Indexed Currency
- Indexed Picklist 1
- Indexed Picklist 2
- Indexed Picklist 3
- Indexed Picklist 4
- Indexed Picklist 5

Exceptions: For all Custom Objects, some fields use different naming conventions to those listed in the previous tables:

- Index Picklist 6 = Type
- Index Short Text 1 = Quick Search 1
- Index Short Text 2 = Quick Search 2
- Index Long Text = Name

About Picklist Customisation in Address Records

All picklist customisations for addresses shared between accounts, contacts, dealers, and partners are also shared (for example, indexed picklists, custom picklist 1, custom picklist 2, and so on). However, it is possible to use a customised label for the picklist. For example, even though the picklist definition for Indexed Picklist 1 is the same for Account Address and Contact Address, the field can be renamed *My Picklist A* in one record, while the field can be renamed *My Picklist 1* in the other record. For indexed picklists, company administrators can choose which picklist to customise and use, however, the company administrators have no such control for custom picklists.

To use indexed custom fields

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Set-up.
5. In the *record type* Field page, click Manage Field Labels and rename the indexed custom fields as appropriate for your company, see Managing Field Labels (on page 152).

Reverting Settings to Defaults

You can revert all relabelled field names to their original names. (The default option does not affect custom fields or picklist values you added - they do not revert to their default values.)

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

To revert settings to their defaults

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the link for the required record type.
4. In the Field Management section, click the required Field Set-up link.
5. In the *record type* Fields page, click the Manage Field Labels button.
6. Click the Default button.

Changing Picklist Values

Some fields give users a drop-down list of predefined values from which they must choose. This list of values is called a *picklist*. For example, the values in the Area field picklist for service requests might be Product, Installation, Maintenance and Training.

You can add, edit and reorder values to the picklists for fields. Picklists must contain at least one value, but the maximum number of values (active or disabled) in a picklist is 1000. The order number for a new picklist entry is automatically populated, but you can change the order number when you edit the picklist.

The system does not allow you to change picklist values used for forecasting and report metrics. However, it does allow you to change other picklist values used as the basis for standard lists that appear in other areas of the application. For those standard lists, the application still includes the records that meet the criteria, regardless of the picklist values you renamed. For more information, see About Fields, Picklists and Metrics (see "About Fields, Picklists, and Metrics" on page 262).

After you create a new picklist, an initial value called <*No Values*> is automatically available in the picklist. This value is used to communicate to users that values do not yet exist in the picklist, in the case where the field is added to a page layout before real values are added to the list. The default <*No Values*> option disappears from the picklist as soon as a custom value is added to a picklist.

CAUTION: Do not use the default <*No Values*> value as part of any new picklist or cascading picklist. Using the value in this way can lead to errors within Oracle CRM On Demand. If you want to continue to have a <*No Values*> option available in a picklist, you must add it as a custom value.

As a best practice, do not rename or reuse the existing picklist values. Instead, disable the old picklist value, create a new picklist value, and perform an import or a mass update (or alternatively, Web Services) to change all record values to new picklist values. If you change a value in a picklist, you must verify that the value is updated and changed for each individual record as this is not implemented automatically by Oracle CRM On Demand.

NOTE: In Oracle CRM On Demand (the standard application), the priority of tasks is indicated in task lists by arrows. An up arrow indicates 1-High priority, no arrow indicates 2-Medium priority, and a down arrow indicates 3-Low priority. If you change the display values for the Priority field in the Activity record type from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless you use the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that you give to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that you add to the picklist for the Priority field.

Before you begin. To perform this procedure, your role must include the Customise Application privilege. In addition, to add or change values in the Status picklist for the Activity record type, your role must include the Customise Application - Edit Activity 'Status' Picklist privilege.

To change picklists

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the link for the required record type.

4 In the Field Management section, click the required Field Set-up link.

5 In the *record type* Fields page, click the Edit Picklist link for the field whose values you want to customise.

NOTE: Due to specialised coding, customising the Oracle CRM On Demand Life Sciences Edition Sample Transaction Type picklist, Account Call Type picklist, and Contact Call Type picklist is not supported.

CAUTION: Adding or editing the values that are available by default in the picklist for the Status field for the Activity record type might produce unwanted results for activity processing. Oracle CRM On Demand specifically looks for the Completed, Submitting, Submitted, or Planned field values when it processes activities. If your company deactivates these status values and replaces them with custom values, then the activity processing in the Oracle CRM On Demand application will not work as documented. Consequently, changing the Status field picklist values for the Activity record type is not recommended.

6 In the Edit Picklist window:

- To change an existing value, enter the new value in the Picklist Values field, or disable the old value and create a new value.

  NOTE: If you want this updated name to appear in the picklists for other activated languages, select the Mark for Translation check box. In the other languages, this updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.
  If you do not select Mark for Translation, the other picklist values are unaffected by the change you made here.

- To add a new value, enter the information in the row that appears at the bottom of the list.

  To add further new values, click Save &New.

  New picklist values that you add automatically appear in blue text and brackets in the other activated languages (regardless of the Mark for Translation checkbox setting).

- To delete a value, select the Disabled check box. To hide or show disabled values, click Hide Disabled and Show Disabled respectively.

  CAUTION: When you disable values, you also hide the translated versions in other languages.

- To arrange the order in which the picklist values appear, change the numbers in the Order column.

  TIP: Consider entering numbers with gaps between them, such as 10, 20, 30 and so on. This allows you to add new values in the middle of the picklist more easily, without reordering the entire list.

- To arrange the picklist values in alphabetical order, click the Save & Order Alphabetically button.

7 In the Edit Picklist window, click Save & Close.

8 To manually enter the translated equivalent of the new picklist value:

a On the Fields page, select the language from the Translation Language drop-down list.

b Click the appropriate Edit Picklist link.

c Enter the translated equivalent and click Save.

NOTE: To help you identify the picklist value when you are editing, the application displays the internal ID and the language-specific default value. If you edit the wrong picklist value, the picklist becomes out of sync across languages. When using dynamic layouts, you cannot use picklist values that are identical to internal picklist IDs as this can result in unpredictable behaviour.

Mapping Picklist Values to Picklist Value Groups

For many record types, you can map the values in the picklist fields to one or more picklist value groups. Picklist value groups limit the values that are available for users to select in picklist fields. Each picklist value group can control one or more picklist fields on one or more record types. For more information about picklist value groups, see About Picklist Value Groups (on page 229).

When mapping the values in a picklist field to the picklist value groups, you can do the following:

- Map some, none, or all of the values to a given picklist value group.
- Map each value to one or more picklist value groups, or to no picklist value group.

To map picklist values to picklist value groups

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Set-up.
5. In the *record type* Fields page, click the Edit PVG link for the picklist that you want to map to one or more picklist value groups.
6. In the PVG Mappings Setup pages, in step 1, do the following:
   a. In the Picklist Value Group section of the page, select a picklist value group.
   b. Use the arrows to move the values that you want to map to the selected picklist value group from the Picklist Available Values list to the Values Related to Selected PVG list.
   c. Repeat steps a and b for each picklist value group that you want to map to the field.
7. When you finish mapping the values to the picklist value groups, go to Step 2 in the PVG Mappings Setup pages and confirm your mappings.
8. Click Finish to save your changes.

Related Topics

See the following topics for related information:

- Considerations When Setting Up Picklist Value Groups (on page 230)
- Process of Setting Up Picklist Value Groups (on page 231)
- Creating Picklist Value Groups (on page 231)

Customising Related Item Layouts

You can customise page layouts to improve the look-and-feel of Oracle CRM On Demand. The layout functionality for related items allows you to customise a related-list layout for most record types to show the specified fields. You can select fields from related lists and some parent fields. You can select which fields that you want to appear, and you can specify the order of the fields that meets your business needs. However, you cannot select the number of rows that are displayed, and you cannot specify the sort fields, except in the case of the Opportunities related item for certain parent record types.

NOTE: You cannot customise the layout for the Teams related information section for most of the record types that support teams.

If the Enable Enhanced View for Tabs option is selected on the company profile, then you can specify custom default filters for the related information sections that support the enhanced view. For more information, see Managing Default Filter Criteria for Related Items (on page 162).

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

The following procedure describes how to customise the related item layout.

To customise the related item layout

1. In the upper right corner of any page, click the Admin global link.
2. Click Application Customisation.
3. In the Record Type Set-up section, click the link for the record type that you want.
4. In the Page Layout Management section, click the Related Information Layout link that you want for the record type that you selected.

   The Related Information Section page appears.
5. In the Related Information Set-up section, select the related information type that you want to customise.

   The Related Information Layout page for the selected related information type appears.

   NOTE: The items in the Related Information Set-up section vary depending on which record type you select.
6. Perform one of the following:
   - Click Edit to modify an existing layout.
   - Click New Layout to create a new layout.
   - Click Copy to copy an existing layout.

   The Related Information Layout Wizard is displayed and guides you through the process.

7 In Step 1 Layout Name, enter a name for the layout and a description (optional), and click Next.

8 In Step 2 Field Set-up, select fields from the available Fields list, and click the up and down arrows, next to the Selected Fields list, to organise the fields in the order that you want.

The maximum number of fields for a layout is 20. If you select more than 20 fields, then an error appears when you try to save the layout.

9 (Optional) To define the sort criteria of *record type* Opportunity Related Items, do the following:

a In the Sort by drop-down list, select a sort field.

You can sort by Modified: Date, Opportunity Name, Close Date, or Created: Date.

b Click Ascending or Descending to select a sort order.

NOTE: If you do not select a sort field, then the default sort field and sort order are used.

The sort criteria apply both where the related information sections are displayed as tabs and where they are displayed as lists. The field selected in the Sort by drop-down menu is used for sorting even if that field is not available in the Selected Field list. For example, if you select Created: Date in the Sort by drop-down menu, then all opportunities are sorted by created date, even if the Created: Date field is not available in the Selected Fields list.

CAUTION: For performance reasons, it is recommended that you only use this option to sort Account Opportunity Related Items.

10 Click Finish.

Managing Default Filter Criteria for Related Items

If the Enable Enhanced View for Tabs option is selected on the company profile, then you can specify custom default filters for the related information sections that support the enhanced view. If you define a filter for a related information section, then the filter is applied when a user opens the parent record Detail page, if both of the following are true:

- The user uses the tab format for the related information sections.
- The field that is used for the filter is an available search field in the search layout that is assigned to the user's role for the related record type.

Users can clear the default filter. However, after a user navigates away from the record Detail page and then returns to it, the custom default filter is applied again.

When specifying the criterion for a custom default filter, note the following considerations:

- Only one filter can exist for a related record type for a given parent record type. You cannot specify different filters for the individual layouts for a related record type.
- A filter can affect performance when a user opens the related information tab, and can affect performance when a user opens the record Detail page, if the related information section is the first tab on the Detail page.

- If the field that you select for the filter is not in a layout for the related information section for the record type, then the field is added to the related information section at run time, provided that the filter field is an available search field in the search layout for the related record type in the user's role.
- Certain fields are optimised to improve performance during searches and when sorting lists. These optimised fields are shown in green text in the list of fields that are available for use as the filter field. As a best practice, use one of these fields for the filter.
- If the field that you select for the filter is not a picklist field, then the filter value that you enter is stored in your user language and it is not translated. When a user opens the list of related records, the records are filtered on the value that you entered for the filter, regardless of the language of the user who opens the filtered list. For information about using picklist fields in default filter criteria, see the About Picklist Fields in Default Filter Criteria section of this topic.
- If you use a field whose format is dependent on the locale of the current user for the filter, then the search returns the records that match the filter value, regardless of the format. For example, if you use a date field for the filter, then the search returns the records where the date in the filter field matches the date that you specify, regardless of how that date is formatted for the user who views the list of related records.
- The search for records that meet the filter criterion is case-sensitive.

About Picklist Fields in Default Filter Criteria

If you select a picklist field for the filter, and if the filter condition requires one or more values to be specified, then you can use the lookup icon (magnifying glass) to select the values, or you can enter the values directly.

For the Equal to, Contains all values, Contains none of the values, and Not equal to conditions, the following behavior applies when you specify the filter criterion:

- If you use the lookup icon to select a picklist value, or if you enter a value that matches an existing picklist value in your language exactly, then the language independent code (LIC) of the picklist value is saved for the search. When a user opens the list of related records, Oracle CRM On Demand compares the LIC that was saved with the LICs of the picklist values, and the corresponding picklist value for the LIC in the user's language is used to filter the list of related records.
- If you enter a value that does not match an existing picklist value in your user language exactly, then the value that you enter is saved for the search. The value is saved in your user language. When a user opens the list of related records, Oracle CRM On Demand compares the value that you entered with the LICs of the picklist values. The records are filtered on the value that you entered for the filter, regardless of the language of the user who opens the filtered list.

For the Between, Greater than, and Less than conditions, the value that you enter or select for the filter is saved for the search. The value is saved in your user language. For these conditions, Oracle CRM On Demand compares the value that you enter with the LICs of the picklist values.

For the Contains at least one value condition, the values that you enter or select for the filter are saved for the search. The values are saved in your user language. For this condition, Oracle CRM On Demand compares the value that you enter with the picklist values, and not the LICs of the values. Therefore, using the Contains at least one value condition for a default filter might result in unpredictable behavior for users who have a different user language.

You can find more information about filter criteria and filter values in the following topics:

- About Filter Conditions

- About Filter Values
- About Searching on Multi-Select Picklists

The following procedure describes how to specify the criterion for a custom default filter for a related record type.

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

To specify the criterion for a custom default filter for a related record type

1. In the upper right corner of any page, click the Admin global link.
2. Click Application Customisation.
3. In the Record Type Setup section, click the link for the parent record type.

   For example, if you want to specify a filter for the list of records in a related information section in a Call Detail page, then click Activity.
4. In the Application Customisation page for the record type, in the Page Layout Management section, click the Related Information Layout link for the relevant record type.

   For example, if you want to specify a filter for the list of records in the Contacts related information section in the Call Detail page for accounts, then in the Activity Application Customisation page, click Account Call Related Information Layout.
5. In the title bar of the Related Information Setup page, click Manage Default Filter Criteria.
6. In the Default Filter Criteria page for the parent record type, do one of the following:

   a. If a filter does not already exist for the related record type, then click New Default Filter Criteria.

   b. If a filter already exists for the related record type, then select an option from the record-level menu for the filter, as follows:

      - If you want to edit the filter, then select Edit.
      - If you want to delete the filter, then select Delete.
7. If you are setting up a filter for the related record type for the first time, then in the Related Record Type field in the Default Filter Criteria Edit page, select the related record type.

   NOTE: When you edit an existing custom default filter for a related record type, you cannot select a different related record type in the Related Record Type field. To create a filter for a different related record type, you must create a new filter.
8. In the Default Filter Criteria section, select the field for the filter, then select the filter condition, and then select or enter the filter value.
9. Save your changes.

About Custom Layout Limits

Certain limits apply to the following layout types:

- Static page layouts
- Dynamic page layouts
- Homepage layouts
- Search layouts

For the static, dynamic, and Homepage layout types, the maximum number of characters (including spaces) that you can use in a custom layout name is 50. For the search layout type, the maximum number of characters (including spaces) that you can use in a custom layout name is 30.

Do not use more than a total of 30,000 characters in total in the layout names of a given type for a record type, including the default layout if one exists. Otherwise, the Role Management Wizard does not work correctly. This limit determines the number of custom layouts that you can create. When the layout names are stored in Oracle CRM On Demand, they are separated by a comma so that the total number of characters required to store a layout name is:

1+(*length of layout name*)

In this case, *length of layout name* is the number of characters in the layout name.

To estimate how many layouts of a given type that you can create for a record type, determine how many characters you will use in a typical layout name, and then apply the following formula:

30000/[1+(*length of layout name*)]

In this formula, *length of layout name* is the number of characters in a typical layout name.

For example, if your company typically uses 29 characters in each custom static page layout name for the Account record type, then approximately 1000 static page layouts can be stored for the Account record type, that is, 30,000 divided by 30. However, the characters used in the name of the default static page layout for the record type are counted as part of the overall limit. Therefore, the number of custom static page layouts that can be stored for the Account record type in this example is 999 or fewer, depending on the length of the name of the default page layout.

Similarly, if your company uses 29 characters in each Homepage layout name for the Account record type, then the number of custom Homepage layouts that can be stored for the Account record type is approximately 999, depending on the length of the name of the default Homepage layout for the Account record type.

Customising Static Page Layouts

The right look and feel of an application is important for user adoption, and one way to achieve the right look and feel is by customising page layouts. As part of the customising process, you can:

- Add custom fields to the Edit, Detail and Create forms.
- Make fields required on the Edit and Create forms.
- Add or hide sections on the Detail pages.

  You can make sections unavailable (hidden) to your employees or you can make them available but hide them initially.

There are two methods of customising page layouts. You can define static page layouts defining specific fields by role, or dynamic page layouts that change based on the type of record being created. Dynamic page layouts can also be assigned by role. The number of characters that you can use in page layout names is limited. For more information, see About Custom Layout Limits (on page 165).

NOTE: You can create page layouts for emails, voicemails, and calls in Oracle Contact On Demand. Dynamic layouts are not supported in Oracle Contact On Demand. You can also define static page layouts for creating new records, as described in Customising Page Layouts for Creating New Records (on page 172).

You can create new layouts for each record type and then assign a page layout for each record type to a user role. When a user with that role signs in, the user then sees any customised layout specific to each record type. For example, you can create two page layouts for opportunities: one simplified layout for service representatives showing the most important fields only and another layout for field sales representatives showing many more fields, and assign the different layouts to the different roles. Users who are not assigned the service representative or field sales representative roles continue to see the default layout for the Opportunity page. As another example, you can create two page layouts for contacts, such that the Account field is required when service representatives add new contacts, but not required when service managers add new contacts.

If you do not assign a custom page layout for a record type for a given role, the default page is used for that record type.

When customising a page layout, you can determine:

- Which fields appear on the page

  For custom fields to appear, you must add them to the page layouts. After that, users with roles to which the custom page layout is assigned will see the fields on the Edit page, Detail page and Create form (in the Action bar).
- Where fields appear on the page
- Which fields are required
- Which fields are read-only
- Which fields must always appear on the layout, even if users personalise their field layout
- Which linked record types are displayed in the Related Information sections on the Detail page.

  For example, you might want linked contacts to appear on the Accounts Detail page.
- How many page sections appear and with which headings.

You can copy standard layouts, but you cannot edit or delete them. You can delete custom layouts, unless it is already assigned to a role or a dynamic layout.

About Personalising Page Layouts

Users can personalise the layout of the related information sections on the Detail page for a record type if the Personalise Detail Page - Related Information privilege is enabled for their user role.

Users can personalise the field layout on the Detail page for a record type when their user role is set up as follows:

- The Personalise Detail Page - Fields privilege is enabled for the role.
- A custom page layout is assigned to the role for the record type.

For more information about personalised page layouts, see the following topics:

- How Personalised Related Information Layouts Interact with Page Layouts for Roles (on page 217)
- How Personalised Field Layouts Interact with Page Layouts for Roles (on page 222)

Considerations for Fields in Page Layouts

When you design your page layouts, consider the following:

- Some record fields are important to report and forecast calculations. To enforce the consistent use of these fields, they are flagged as required. You cannot change the required flag on these fields when customising a page layout. Neither can you remove them from a page layout.
- Removing fields from a page layout can have important implications for how the records are used. For example, if you remove the Status and Publish fields on solutions records, employees with that page layout cannot approve solutions or make them available to others.
- Addresses are grouped together so that the field and their labels reflect the naming convention for each country. Therefore, for some record types, you cannot separate out individual address lines. Instead, you must select the field that includes the group of address lines (a single address option). This option replaces the individual fields that you could select in releases earlier than Release 20, such as Street, City, Zip Code. For example, for leads, the Invoicing field appears on the Field Set-up and Field Layout steps of the Page Layout assistant. The Invoicing field includes all the Invoicing Address fields.
- You can move standard and custom note fields in the Long Text Field(s) list on your page layout to other areas in your page layout.
- You can move the following fields to and from the Long Text field(s) list, and to and from other areas, in your page layout:

Record	Field Name
Account Address	Description
Address	Description
Address	Comments
Sales Assessment Template	Description
Activity	Next Call
Application	Existing Partnerships
Application	Expected Partnership Benefits
Application	Indexed Long Text
Asset	Description
Book	Description
Dealer Address	Description

Record	Field Name
Event	Description
Event	Session Details
Event	Test Objective
Fund	Description
Fund Request	Description
Household	Description
Invitee	Comments
Invitee	Session Detail
Messaging Plan Item	Synopsis
Messaging Plan Item	Speaker Notes
Messaging Plan Item	Audience
Messaging Plan	Audience
Messaging Plan	Comment
Messaging Plan	Description
Messaging Plan Item Relations	Audience
Messaging Plan Item Relations	Synopsis
Objective	Description
Objective	Target Audience
Account Call	Next Call
Account Call	Description
Appointment	Next Call
Appointment	Description
Attendee Call	Next Call
Attendee Call	Description
Contact Address	Acceptable Schedules
Contact Address	Description
Contact Call	Description
Contact Call	Next Call
Smart Call	Description

Record	Field Name
Smart Call	Next Call
Task	Description
Task	Next Call
Partner	Description
Partner Address	Description
Partner Programme	Description
Product	Description
Product Indication	Description
Revenue	Description
Account Revenue	Description
Contact Revenue	Description
Opportunity Product Revenue	Description
Sample Disclaimer	Disclaimer Text
Sample Lot	Description
Sample Transaction	Comments
Service Request	Subject
Transaction Item	Description
Vehicle	Description
Vehicle Service History	Description

Page Layouts and Lists

You can use page layouts and role privileges to limit the fields that users can search, view in lists, and export. When a user creates or refines a list of records or uses advanced search to find records, the privileges and page layouts assigned to the user's role determine which fields the user can search and view.

If the All Fields in Search and Lists privilege is enabled for the user's role, then the user can search all of the search fields that are made available in the search layout that is assigned to the user's role for the record type. Also, when creating or refining a list, the user can select any field to display it as a column in the list of records that is returned by the search.

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

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

- The field is an available search field in the search layout that is assigned to the user's role for the record type.
- The field is displayed on the Detail page layout that is assigned to the user's role for that record type. If dynamic page layouts are defined for the role, then the field must be displayed on at least one of the dynamic page layouts.

Also, when creating or refining a list, the user can select a field to display it as a column in the list of records that is returned by the search only if the field is displayed on at least one of the Detail page layouts, including dynamic page layouts, that are assigned to the user's role for the record type. This restriction also affects what the user can export in a list. If the List - Export Displayed Fields privilege is enabled on the user's role, but the List - Export All Fields privilege is not enabled, then the user can export only the fields that are displayed in the list. The user cannot export all fields on the records in the list.

NOTE: In the case of advanced searches that users start from the Advanced link in a list of related records on a parent record, additional considerations apply to the availability of search fields and the fields that can be displayed in the search results. For more information, see About Advanced Search of Related Records.

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

To create a page layout

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the link for the required record type.
4. In the Page Layout section, click the required Page Layout link.
5. In the Page Layout list, perform one of the following:
   - Click the Edit link for an existing layout to modify it.
   - Click the New Layout button to create a new layout.
   - Click the Copy link to copy an existing layout.

   The Page Layout Wizard appears to guide you through the process.

   NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link you click.
6. In Step 1 Layout Name, enter a name for the layout and a description (optional).
7. In Step 2 Field Set-up, select the field characteristics, as follows:
   - Select the Required checkbox for any fields that you want to make required.

     NOTE: Users are not compelled to select a field of type Checkbox that is marked as Required. If you want the check box field to have a value of True (that is, you want the check box to be

selected), then you must use field validation rules on the check box field. For more information, see About Field Management (on page 106).

- Select the Read Only checkbox for any fields that you want to make read-only.
- Select the Always On Layout check box for any fields that you do not want users to be able to remove from their layout.

  NOTE: When you create a new page layout, the Always On Layout check box is selected by default and is read-only for any field that is configured as a required field, unless a default value is configured for the field. If a default value is configured for a required field, then the Always On Layout check box is selected, but you can deselect it. It is also recommended that you select the Always On Layout check box for any fields that are configured as conditionally required. And, if you use or plan to use a dynamic page layout for the record type, then it is recommended that you select the Always On Layout check box for the picklist field that drives the dynamic layout.

For information about the Conditionally Required check box, see About Conditionally Required Fields (on page 122).

8 In Step 3 Field Layout, you can:

- Move fields from the *record type* Available Fields list to various sections of the *record type* Arrange Page Layout area.

  Make sure that you move the custom fields and the industry-specific fields you want to add to the forms. Also, if any of the fields for which you selected the Always On Layout check box in Step 2 are not already on the layout, then add them to the layout.

  CAUTION: Unless a default value is configured for a required field, the required field must be on the page layout. Otherwise, anyone with that layout will be unable to create or edit a record of that type. If a default value is configured for a required field, then the required field can optionally appear on the page layout. Similarly, you must make sure that any conditionally required fields are on the relevant page layouts. Otherwise, users will not be able to enter a value for those fields when they become required.

- Remove the Description field from your page layout or move the Description field to another area on your page layout.
- Rearrange the information.

NOTE: These changes affect all the forms for that record type when a user with an appropriate role views the pages. However, if you update the field layout after a user personalises the field layout for the record type, then the changes do not apply to the personalised layout. Some fields include a group of fields or multi-line fields. Avoid moving those fields around because the information itself might overlap other fields in the final layout. For this reason, the application does not allow you to move multi-line text fields, such as Description.
The application uses an address template that provides the fields specific to each country. For more information, see About Countries and Address Mapping (on page 563).

9 In Step 4 Related Information, you can:

- Add sections or remove sections that appear on the Detail pages. The sections are the areas where users can link records to the current record.

  For example, if you do not want employees to be able to link products to opportunities, make sure the Products section does not appear in the Displayed or Available Information box.

NOTE: Users can change these default settings through the Edit Layout link on the Detail page for their application. After users have edited their personal layouts, they do not see new changes to the related information made by the company administrator until they edit their layout another time.

- Change the order of the sections on the Detail pages.

NOTE: These changes affect the Detail pages for that record type when a user with an appropriate custom role views the pages.

10 In Step 5 Related Information Layout, select the appropriate related information layout for each of the related information sections on the page.

NOTE: The default layout for each related information section is the standard one. If you have created custom related information layouts already, you can select them from the list. For more information about creating related information layouts, see Customising Related Item Layouts (on page 161).

11 Click Finish.

12 Assign the page layout for this record type to user roles as required, see Adding Roles (on page 309).

Customising Page Layouts for Creating New Records

You can create and customise page layouts used to create new records. For these layouts, you can improve the look-and-feel of Oracle CRM On Demand, allowing users to view only the most relevant and the most frequently used fields for a record type.

In the New Record Layout page you can select which fields appear in the layout, which fields are required, which fields are read-only, and you can rearrange the order of the fields in the layout to meet your business needs.

You can copy or edit an existing layout and then modify it to your requirements.

NOTE: The number of characters that you can use in layout names is limited. For more information, see About Custom Layout Limits (on page 165).

After you create a layout, you must use the Role Management Wizard to assign the New record layout to the user roles that need to use that layout. When you do so, you also specify where the layout is used in the application. For example, you can specify that the layout is used only when a user creates a record through the Action bar or the global header. For more information about assigning New record layouts to roles, see Adding Roles (on page 309) and About the Layouts of New Record Pages.

To create or modify a layout for creating new records

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Record Type Set-up section, click the link for the required record type.

4 In the Page Layout Management section, click the *record type* New Record Layout link.

5 In the New Record Layout page, do one of the following:

- Click Edit or Copy to modify an existing layout.
- Click the New Layout button to create a new layout.

The Page Layout Wizard appears to guide you through the process.

6 In Step 1 Layout Name, enter a name for the layout, and a description if required.

7 In Step 2 Field Setup, select the field characteristics, as follows:

- Select the Required checkbox for any fields that you want to make required.

  NOTE: Users are not compelled to select a field of type check box field that are marked as Required. If you want the check box field to have a value of True (that is, you want the check box to be selected), then you must use field validation rules on the check box field. For more information, see About Field Management (on page 106).

- Select the Read Only checkbox for any fields that you want to make read-only.

For information about the Conditionally Required check box, see About Conditionally Required Fields (on page 122).

8 In Step 3 Field Layout, you can:

- Move fields from the Available record type Fields list to various sections of the Arrange *record type* Page Layout area.

  Make sure you move the custom fields and the industry-specific fields you want to add to the page layout.

  CAUTION: Unless a default value is configured for a required field, the required field must be on the page layout. Otherwise, anyone with that layout will be unable to create a record of that type. If a default value is configured for a required field, then the required field can optionally appear on the page layout. Similarly, you must make sure that any conditionally required fields are on the relevant page layouts. Otherwise, users will not be able to enter a value for those fields when they become required.

- Remove the Description field from your page layout or make sure the Description field is in the Long Text Field(s) section of your page layout.
- Rearrange the information by moving the fields between sections, as required.

NOTE: These changes affect all the forms for that record type when a user with an appropriate role views the pages. Some fields include a group of fields or multi-line fields. Avoid moving those fields around as the information itself might overlap other fields in the final layout.

9 Click Finish.

NOTE: After you add a layout to the application, you need to make it available to a user role before users can see it. For more information on adding and modifying user roles, see Adding Roles (on page 309).

Renaming Field Section Titles

On the record Edit and Detail pages, fields are grouped into sections. To use terminology that is familiar to your users, you can rename the titles above groups of fields on your Edit and Detail pages. On the Account Homepage, for example, you can change Key Account Information to Account Profile.

You cannot rename sections on the standard layouts. You must create a new one and rename the sections on the custom layout.

Sections with no fields in them do not appear on the Detail page.

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

To rename a section

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Page Layout section, click the required Page Layout link.
5. In the *record type* Page Layout page, click Edit Sections.
6. In the Translation Language drop-down list, select the primary language for your company.
7. In the Display Name, type in the name you want to use.
8. (Optional) To indicate that an updated name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

   NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

9. To manually enter the translated equivalent of the new name:

   a. From the Translation Language drop-down list, select the language whose translation you want to enter.

   b. Enter the translated equivalent in the appropriate Display Name field and click Save.

   c. Click the link to return to the Fields page you just updated and select the language again, if necessary.

      The translated name appears in black text in the Display Name column.

About Custom Web Applets

Custom Web applets allow you to embed external Web content, reports, and dashboards in the following places in Oracle CRM On Demand:

- For global Web applets:
  - Action bar

    NOTE: For Release 27 and later, this also can refer to global Web applets in the global header, which can be configured as part of an Action Bar and Global Header layout.
  - My Homepage
- For record type Web applets:
  - Record type homepage
  - Detail page

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (see "Important Considerations for Customers Using Customised Code in Oracle CRM On Demand" on page 235).

You can create five types of Web applet, which allows you to embed different types of Web content:

- **Dashboard.** Used to embed dashboards.
- **Feed.** Used to embed RSS feeds. For example, you might want to embed a news feed on My Homepage.

  Note: Only the RSS 2.0 standard is supported.
- **HTML**. Used to embed HTML code. For example, use this Web applet to embed Web widgets from an external source such as Google Maps.
- **Report.** Used to embed reports.
- **URL**. Used to embed the content available at the specified URL in an applet within Oracle CRM On Demand. For example, you might have a custom Web applet on the Lead Details page that allows you to see a Google search on that lead's name. For more information on the standardisation of URLs in Oracle CRM On Demand, see About URL Standardisation (on page 224).

  NOTE: Although it is possible to use a URL to embed a report or dashboard in a custom Web applet, Web tab, or Web link of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade.For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 142).

You can add a Web applet for any record type for which the Page Layout links are visible.

There are two advantages to creating a custom Web applet rather than a custom Web tab:

- A custom Web applet that is displayed on a page, such as Lead Details, allows you to view data on the Details page together with other contextual data. On the other hand, if your external data is viewed using a Web tab, when you click the Web tab, you are directed away from the Details page, and redirected to the Web tab page.
- Your company might have a great deal of information that you want to display, for example, portfolio holdings. Custom Web applets allow you to show a large amount of data from another Web site without

requiring you to load information in to Oracle CRM On Demand. Loading large amounts of data in to Oracle CRM On Demand requires integration tools to manage large numbers of data columns.

Custom Web Applet Limits

The maximum number of custom Web applets that can be shown in a layout wizard is 200. This limit applies in the layout wizards for My Homepage, record type homepages and detail pages, and the Action bar. Custom homepage reports are included in the count of custom Web applets for the record type homepage and My Homepage locations.

This limit can affect the layouts that end users see in the application as well as the layout wizards that administrators use to create and edit layouts. If more than 200 custom Web applets are created for a location (that is, for My Homepage, or a record type homepage or detail page, or the Action bar), then the next time that you edit a layout for that location, only the 200 most recently modified custom Web applets are shown in the layout wizard. Any remaining custom Web applets are not shown, even if those applets were previously included in the list of displayed applets or the list of available applets. After you save your changes to the layout, any applet that was not available in the wizard is no longer available for end users whose role has that layout, even if the applet was previously displayed in the layout by default or was available for users to add to their layout.

Related Information

See the following topics for related information:

- Creating Web Applets for Record Types (on page 177)
- Creating Global Web Applets (on page 234)
- Creating Dashboard Web Applets (on page 188)
- Creating HTML Web Applets (on page 183)
- Creating Report Web Applets (on page 187)
- Creating RSS Feed Web Applets (on page 179)
- Creating URL Web Applets (on page 184)
- Example of Setting Up an RSS Feed Web Applet (on page 189)
- Translating Web Applet and Custom Report Names (on page 191)
- About Disabling Customised Code for Users (on page 176)

About Disabling Customised Code for Users

When you are troubleshooting a technical issue for a user in Oracle CRM On Demand, you might want to disable all customised code, including the customised code in custom Web applets and all custom HTML head additions, for that user. If the issue no longer occurs when the customised code is disabled, then it is likely that the customised code is the cause of the issue. Also, if you contact Oracle for assistance, then you might be asked to disable all customised code to help troubleshoot the issue.

The Customised Code Enablement field in a user's profile allows administrators to disable all of the customised code for that user, and also to enable the customised code indicator for the user. When the customised code

indicator is enabled for a user, one of the following messages appears at the bottom of each page that the user accesses in Oracle CRM On Demand:

- **Customised code active.** Customised code is detected and is active in the current page.
- **Customised code not detected.** No customised code is detected in the current page.
- **Customised code disabled.** Customised code is detected for the current page, but the customised code is disabled.

For information about the options that are available in the Customised Code Enablement field, see User Fields (on page 273).

NOTE: If you add the Customised Code Enablement field to the User Owner page layout for a user role, then users who have that role can disable the customised code and enable the customised code indicator for themselves.

About Customised Code in Source Code

When customised code is active in a page, the customised code is visible in the source code for the page, with comments to mark the start and end of the customised code. When the customised code is disabled, the customised code is not included in the source code for the page. Instead, the source code includes a comment to indicate that the customised code is disabled.

Creating Web Applets for Record Types

You can embed external Web content by creating a custom Web applet that appears on a Homepage or the Detail page for a record type. You can also embed reports and dashboards in custom Web applets for record-type Homepages and Detail pages.

When you create a Web applet, you must add it to the page layout for the Homepage or Detail page. For users to see that page layout, it must be assigned to an appropriate user role.

Before you begin. To perform this procedure, your role must include the Customise Application and Manage Custom Web Applets privileges. If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then you can create applets only if the language that is selected in the Translation Language field is the default language for the company.

To create a new Web applet

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the link for the required record type.
4. In the Page Layout Management section, click the required record type Web Applet link.
5. In the *record type* Applet list, click New.
6. On the Web Applet page, complete the following fields.

Field	Comments
Name	Enter a name. The value in the name field appears in the title bar of the Related Information section.
Mark for Translation	This check box is available only if the Enable Language Translation Support for Web Applets check box is selected on the company profile. When you first create an applet, the Mark for Translation check box is selected and read-only. The Mark for Translation check box is effective only when you update an existing applet. In addition, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Language field in the list of applets before you edit the applet. For more information about translating custom Web applet names, see Translating Web Applet and Custom Report Names (on page 191). If you change the name of an existing custom Web applet in the default language for the company, then use the Mark for Translation check box as follows: ■ If you want the translated versions of the name to be replaced by the updated name, then select the Mark for Translation check box. ■ If you want the translated versions of the name to remain unchanged, then do not select the Mark for Translations check box.
Location	Select Homepage or Detail Page, depending on whether the external content, report, or dashboard is to appear on a homepage or on the Detail page.
Columns	**NOTE:** This field is applicable only when the Location value is Homepage. Specify the width of the applet by selecting single or double from the Columns menu.

Next, complete the fields according to the type of applet you require, as described in the following topics:

- Creating Dashboard Web Applets (on page 188)
- Creating HTML Web Applets (on page 183)
- Creating Report Web Applets (on page 187)
- Creating RSS Feed Web Applets (on page 179)
- Creating URL Web Applets (on page 184)

To make the Web applet visible

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Record Type Set-up section, click the link for the required record type.

4 In the Page Layout section, click the required Page Layout link.

5 In the Page Layout list, perform one of the following:

- Click Edit to modify an existing layout.
- Click New Layout to create a new layout.
- Click Copy to copy an existing layout.

The Page Layout Wizard is displayed and guides you through the process.

NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link you click. In Step 1 Layout Name, make sure the layout has a name, and if required, a description.

6 In Step 4 Related Information:

a Move the new Custom Web applet from the Available Information list to the Displayed Information list.

b Click the up and down arrows to position the new custom Web applet, as required.

c Click Finish to create the new layout.

7 Add the page layout to user roles as required, see Adding Roles (on page 309).

Related Topic

The following topic provides an example of creating a Web applet that displays a Twitter RSS feed:

- Example of Setting Up an RSS Feed Web Applet (on page 189)

Creating RSS Feed Web Applets

Create this type of applet for RSS feeds that you want to embed in the application. Configure RSS feed applets so that embedded content is relevant to user roles.

You can allow users to configure RSS feed applets, but it is recommended that you make only a small number of applets configurable. If you add an RSS feed applet to the Action bar, and make the records available in a custom Web tab, users can read the feeds more easily, because they do not have to navigate to a different page.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (see "Important Considerations for Customers Using Customised Code in Oracle CRM On Demand" on page 235).

To create an RSS feed applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 177) and Creating Global Web Applets (on page 234).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Type	Select Feed.

Field	Comments

User and System Fields	Before you create a Web applet in Oracle CRM On Demand, carefully consider how you will use parameter field variables such as %%%User Id%%%, if the field contains characters that can be escaped as character entity references.
	
	When you insert parameter field variables in HTML, characters in the field name like & are escaped as the corresponding character entity reference, (in this case &) and the browser expands the entity reference so that the referenced character is displayed. For example, you might want to create a homepage HTML Web applet with the company name: A&B Manufacturing. From the User and System Fields drop-down list, you can choose Company Name to insert the variable: %%%Company name%%% and at run time, this variable has the value A&B Manufacturing, which appears in the browser as A&B Manufacturing. However, character entity references are not expanded in JavaScript code, so in this case, put the variable in a referenceable context, retrieve it from the document DOM, then encode it as necessary. These differences are illustrated in the following example of Web Applet HTML code:
	
	`<span id=”companyname” style=”display:none” data-value=”%%%Company name%%%”></span>`
	
	`<script type=”text/javascript”>`
	
	`var var1 = ”%%%Company name%%%”;`
	
	`var var2 = document.getElementById(“companyname”).getAttribute(“data-value”);`
	
	`</script>`
	
	The value of var1 is “A&B Manufacturing” and the value of var2 is “A&B Manufacturing”. The values of var1 and var2 are different because the browser expands entity references in HTML tags and data, but not within the <script> element.
	
	Select an option from the User and System Fields drop-down list to add parameter fields to the URL field at the current position of the cursor.
	
	For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At run time, this parameter is replaced with the user ID of the user who is signed in.
	
	As another example, if you choose Host Name from the list, %%%Hostname%%% is inserted at the cursor position. At run-time, this parameter is replaced with the host name of the server where Oracle CRM On Demand is running. This is useful in configurations containing a URL to Oracle CRM On Demand as it is no longer necessary to manually modify the Oracle CRM On Demand host name when migrating from one environment to another.
	
	For more information, see User and System Fields (on page 145).

Field	Comments
Record Type Fields	**NOTE:** This field is applicable only when the Location value is Detail Page. Place your cursor in the URL field where you want to add a parameter, then select the field that you want to include from the drop-down list. For example, if you select the field Row id, %%%Row id%%% is inserted. At runtime, this parameter is replaced with the row ID of the current record.
Functions	Select EncodeURL from the picklist if your Oracle CRM On Demand URL requires further encoding to display it correctly.
URL	Enter the URL that is invoked when the user clicks the hyperlink, such as http://rss.news.yahoo.com/topstories. You must include *http://* in the URL. Make sure that the URL is a valid uniform resource identifier (URI). If it is not valid, then an error message is displayed instead of the embedded content when a user accesses the custom Web applet. **NOTE:** For more information on the standardization of URLs in Oracle CRM On Demand, see About URL Standardization (see "About URL Standardisation" on page 224). You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User and System Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the applet calls the source URL. If you do not specify a URL, the user is directed to a void URL when the link is clicked. **NOTE:** Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behaviour on the browser.
Let users override URL	Configure RSS feed applets for content that is relevant to user roles. While you can enable users to configure RSS feed applets, it is recommended that you make only a small number of applets configurable.
Open Records in	Select a value depending on whether you want records to open in the current browser window or a new browser window. If you want to add the RSS feed applet to the Action Bar, remember that the feeds are easier to read in a new browser window. In doing this, it prevents the user needing to navigate to a different page.

Field	Comments
Height	The height of the applet in pixels.
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

Creating HTML Web Applets

Create this type of applet for embedded content in the HTML code, to which you want to make additions.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (see "Important Considerations for Customers Using Customised Code in Oracle CRM On Demand" on page 235).

To create a HTML Web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 177) and Creating Global Web Applets (on page 234).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Type	Select HTML.
Record Type Fields	**NOTE:** This field is applicable only when the Location value is Detail Page. Place your cursor in the Web Applet HTML field where you want to add a parameter, then select the field that you want to include from the drop-down list. For example, if you select the field Row id, %%%Row id%%% is inserted. At runtime, this parameter is replaced with the row ID of the current record.

Field	Comments
HTML Head Additions	The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web applet. Any code that you add to the Web Applet HTML field is added to the <iframe> element. You can include references to JavaScript files that you embed in the <head> section of the HTML in this field. Referencing JavaScript files on Oracle CRM On Demand pages is not supported. Any content that you enter in this field is added to the <head> tags.
Web Applet HTML	The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web applet. Any code that you add to the Web Applet HTML field is added to the <iframe> element. Any content that you enter in this field is added to the <body> tags.
Always Run	This check box determines whether the custom Web applet will be executed if the applet is minimised. This check box is available only for Web applets that you create for record-type Detail pages or the Action bar.
Height	The height of the applet in pixels.
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

Creating URL Web Applets

Create this type of applet when you want to embed content from a URL in an IFrame.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (see "Important Considerations for Customers Using Customised Code in Oracle CRM On Demand" on page 235).

To create a URL Web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 177) and Creating Global Web Applets (on page 234).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Type	Select URL.
User and System Fields	Select an option from the User and System Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor. For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At run time, this parameter is replaced with the user ID of the user who is signed in. As another example, if you choose Host Name from the list, %%%Hostname%%% is inserted at the cursor position. At run-time, this parameter is replaced with the host name of the server where Oracle CRM On Demand is running. This is useful in configurations containing a URL to Oracle CRM On Demand as it is no longer necessary to manually modify the Oracle CRM On Demand host name when migrating from one environment to another.
Record Type Fields	**NOTE:** This field is applicable only when the Location value is Detail Page. Place your cursor in the URL field where you want to add a parameter, then select the field that you want to include from the drop-down list. For example, if you select the field Row id, %%%Row id%%% is inserted. At runtime, this parameter is replaced with the row ID of the current record.
Functions	Select EncodeURL from the picklist if your Oracle CRM On Demand URL requires further encoding to display it correctly.

Field	Comments
URL	Enter the URL that is invoked when the user clicks the hyperlink, such as http://maps.google.com. You must include the http:// part of the URL. Make sure that the URL is a valid uniform resource identifier (URI). If it is not valid, then an error message is displayed instead of the embedded content when a user accesses the custom Web applet. You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User and System Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the user clicks the value. For example, the following URL passes in the shipping address to Google maps: http://maps.google.com/?q=%%%Ship_To_ADDR_Address1%%%,+%%%Ship_To_CITY_City%%%,+%%%SHIP_LIST_USSTATE%%% If you do not specify a URL, the user is directed to a void URL when the link is clicked. **NOTE:** Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behaviour on the browser.
Always Run	This check box determines whether the custom Web applet will be executed if the applet is minimised. This check box is available only for Web applets that you create for record-type Detail pages or the Action bar.
Height	The height of the applet in pixels.
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

Creating Report Web Applets

Create this type of applet when you want to embed a report. You can specify filters that will be applied to the report at run time.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 142).

Before you begin. The report that you want to embed in the Web applet must be stored under Shared Folders, in a folder to which you have access.

To create a report web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 177) and Creating Global Web Applets (on page 234).

- On the Web Applet page, complete the following fields, and then click Save.

Field	Comments
Type	Select Report.
Path	Click the Lookup icon (magnifying glass), then navigate to the report you require in Shared Folders, and then click OK. The Path field is automatically populated after you select the report.
Parameters	(Optional) Specify the filters that you want to apply to the report at run time. For detailed information about specifying the filters, see About Specifying Filters for Embedded Reports and Dashboards. You can add fields as parameters, as follows: ■ To include a user or system field in a filter parameter, place your cursor in the Parameters field at the position where you want to add the parameter, and then select the field that you want to include from the User and System Fields list. For information about the user and system fields that you can use in the parameters, see User and System Fields. ■ (Web applets for record-type Detail pages only) To include a field from the record type in a filter parameter, place your cursor in the Parameters field at the position where you want to add the field, and then select the field from the *record type* Fields list, where *record type* is the name of the record type for which you are creating the applet.
Always Run	This check box determines whether the custom Web applet will be executed if the applet is minimised. This check box is available only for Web applets that you create for record-type Detail pages or the Action bar.
Description	(Optional) Enter a description for the applet.
Height	Enter the height for the applet, in pixels.

Field	Comments
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (see "Important Considerations for Customers Using Customised Code in Oracle CRM On Demand" on page 235).

Creating Dashboard Web Applets

Create this type of applet to embed a dashboard. You can specify filters that will be applied to the reports in the dashboard at run time.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 142).

Before you begin. The dashboard that you want to embed in the Web applet must be stored under Shared Folders, in a folder to which you have access.

To create a dashboard web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 177) and Creating Global Web Applets (on page 234).

- On the Web Applet page, complete the following fields, and then click Save.

Field	Comments
Type	Select Dashboard.
Path	Click the Lookup icon (magnifying glass), then navigate to the dashboard you require in Shared Folders, and then click OK. The Path field is automatically populated after you select a dashboard.

Field	Comments
Parameters	(Optional) Specify the filters that you want to apply to the reports in the dashboard at run time. The filters apply to all of the reports in the dashboard. For detailed information about specifying the filters, see About Specifying Filters for Embedded Reports and Dashboards. ■ To include a user or system field in a filter parameter, place your cursor in the Parameters field at the position where you want to add the parameter, and then select the field that you want to include from the User and System Fields list. For information about the user and system fields that you can use in the parameters, see User and System Fields. ■ (Web applets for record-type Detail pages only) To include a field from the record type in a filter parameter, place your cursor in the Parameters field at the position where you want to add the field, and then select the field from the *record type* Fields list, where *record type* is the name of the record type for which you are creating the applet.
Always Run	This check box determines whether the custom Web applet will be executed if the applet is minimised. This check box is available only for Web applets that you create for record-type Detail pages or the Action bar.
Description	(Optional) Enter a description for the Web applet.
Height	Enter the height for the applet, in pixels.
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (see "Important Considerations for Customers Using Customised Code in Oracle CRM On Demand" on page 235).

Example of Setting Up an RSS Feed Web Applet

This topic gives one example of setting up an RSS feed Web applet. You might use this feature differently, depending on your business model. This example sets up an RSS feed Web applet in the contact record detail page for users who have the Field Sales Rep role. The Web applet displays the Twitter feed for the contact.

The company administrator sets up the Twitter ID field on the Contact record type and creates the Twitter Web applet. The company administrator then adds the new field and the Twitter Web applet to the page layout for the Field Sales Rep role. Users who have the Field Sales Rep role can then enter the Twitter ID for a contact in the Contact Detail page. When a user (who has the Field Sales Rep role) populates the field with the contact's Twitter ID, the Twitter RSS feed for the contact appears in the Twitter Web applet on the Contact Detail page.

Before you begin. To set up the Twitter ID field, create the Twitter Web applet, and add the field and the applet to the page layout, you must have the Customise Application privilege in your user role.

To create an RSS feed Web applet (Company Administrator)

1. Set up the Twitter ID field on the Contact record type, as follows:
   a. In the upper right corner of any page, click the Admin global link.
   b. In the Application Customisation section, click the Application Customisation link.
   c. In the Record Types Setup section, click Contact.
   d. In the Field Management section, click Contact Field Setup.
   e. On the Fields page, click New Field.
   f. In the Contact Field Edit page, enter Twitter ID in the Display Name field, and select Text (Short) in the Field Type field.
   g. Save your changes.
2. Click Back to Contact Application Customisation.
3. Create the Twitter Web applet, as follows:
   a. In the Contact Application Customisation page, in the Page Layout Management section, click Contact Web Applet.
   b. In the Contact Applet List page, click New.
   c. In the Contact Web Applet page, enter the details of the Web applet, as follows:
      - Enter a name for the Web applet, such as Contact Twitter Feed.
      - In the Location field, select Detail Page.
      - In the Type field, select Feed.
      - In the URL fields, enter the following:
        http://twitter.com/statuses/user_timeline.rss?id=%%%stTwitter_ID%%%&count=10
      - In the Let users override URL field, select No.
      - In the Open Records In field, select Current Window.
      - In the Description field, enter a description such as Twitter Feed for Contact.
      - In the Height field, enter 200.

      NOTE: The URL specifies that 10 lines of the feed are to be shown in the applet on the Contact Detail page (count=10). To show 10 lines, a height of 200 pixels is appropriate for the applet. If you want more than 10 lines of the feed to appear on the Contact Detail page, change the URL accordingly, and increase the height of the applet.

d Save your changes.

4 Click Back to Contact Application Customisation.

5 Add the Twitter ID field and the Web applet to the contact page layout for the user role, as follows:

a In the Contact Application Customisation page, in the Page Layout Management section, click Contact Page Layout.

b In the record-level menu for the page layout that is assigned to the Field Sales Rep role, click Edit.

c In Step 3, Field Layout, use the arrows to move the Twitter ID field from the Available Contact Fields section to the page section field to appear, for example, the Key Contact Information section.

d In Step 4, Related Information, use the arrows to move the Web applet you created from the Available Information section to the Displayed Information section.

e Click Finish to save your changes.

The next time a user who has the Field Sales Rep role edits a contact record, or creates a new contact record, the user can set up the Twitter RSS feed for a contact as described in the following procedure.

To set up the Twitter RSS feed for a contact (User)

1 Open an existing contact record, or create and save a new contact.

2 In the Contact Detail page, if the Contact Twitter Feed applet is not displayed on the page, add the applet as follows:

a Click Edit Layout.

b If the Personal Layout page opens, then click Related Information.

c In the Personal Layout - Related Information page, use the arrows to move the Contact Twitter Feed applet from the Available section to the Displayed Information section.

d Save your changes.

3 In the Contact Detail page, click Edit.

4 In the Contact Edit page, in the Twitter ID field, enter the Twitter ID for the contact.

5 Save your changes.

The Twitter feed for the contact appears in the Contact Twitter Feed applet on the Contact Detail page.

Translating Web Applet and Custom Report Names

Depending on the setting of the Enable Language Translation Support for Web Applets check box on the company profile, you might be able to enter translated names for the following types of applets:

- Custom Web applets, including global Web applets and Web applets for record types
- Applets that display custom reports on record-type homepages
- Applets that display custom reports on My Homepage

If the Enable Language Translation Support for Web Applets check box is deselected on the company profile, then you cannot enter translated names for these types of applets.

If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then the behaviour is as follows for these types of applets:

- The Translation Language field is available when you view a list of the applets. You can create applets only if the language that is selected in the Translation Language field is the default language for the company. After you create a new applet, the applet name appears in a blue font and within brackets in every language other than the default language for the company. You can then edit the applet to enter the translated versions of the applet name.
- The Mark for Translation check box is available in the pages where you edit the applets. If you change the name of the applet in the default language for the company, then you can use the Mark for Translation check box to indicate whether the translated versions of the applet name are to be replaced by the updated name, or whether they are to remain unchanged. If you select the Mark for Translation check box, then the updated applet name appears in the default font in the default company language, and it also appears in a blue font and within brackets in every other language until you enter the translated name for the language. If you do not select the Mark for Translation check box when you update the applet name in the default company language, then the applet name changes in the default company language, but the translated applet names are not changed.

NOTE: When you first create an applet, the Mark for Translation check box is selected and read-only. The Mark for Translation check box is effective only when you update an existing applet. In addition, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Language field in the list of applets before you edit the applet.

The following procedure describes how to enter a translated version of an applet name.

To enter a translated version of an applet name

1. Navigate to the List page for the applets.
2. In the List page for the applets, in the Translation Language field, select the language for which you want to enter a translated name.
3. Click the Edit link for the applet.
4. In the Name field, enter the translated name for the applet.
5. Save your changes.

Repeat this procedure for each language as necessary.

Related Topics

- Creating Web Applets for Record Types (on page 177)

- Creating Homepage Custom Reports (on page 202)
- Creating Global Web Applets (on page 234)
- Enabling Custom Reports in My Homepage (on page 244)

Defining Cascading Picklists

Cascading picklists restrict the values of one picklist, the *related* picklist, based on the value selected in another picklist, the *parent* picklist. For example, a parent picklist might present a list of service request Categories and drive the value of a related picklist called Sub-Categories. When the user selects, for example, the value Installation for Category, the Sub-Categories picklist is dynamically restricted to show only the picklist values that are associated with the Installation Category.

You can link together multiple picklists, including both predefined and custom picklist fields, as cascading picklists. You can also nest cascading picklists, so a related picklist in one cascading picklists definition can be a parent picklist in another cascading picklists definition.

If you have a number of nested cascading picklists, and if you update the top-level parent picklist value, then your updated values are reflected only in the first level of nesting, as shown in the following example:

- You have a cascading parent picklist called Account Type and a related picklist called Account Priority.
- You have a second cascading parent picklist called Account Priority and a related picklist called Account Category.
- You have an Account record with the following values:
  - **Account Type.** The value for this field is Customer.
  - **Account Priority.** The value for this field is High.
  - **Account Category.** The value for this field is Platinum.
- If you update the Account Type value to Partner, then the value for Account Priority is automatically reset. However, the Account Category value remains unchanged.

You can use picklist fields that contain values that are mapped to picklist value groups in cascading picklists. However, in a cascading picklist definition, you can specify only one set of relationships between the values in the parent picklist field and the values in the related picklist fields, regardless of whether you select a picklist value group in the Picklist Value Group list when you define the cascading picklist. For more information about how cascading picklists work with picklist value groups, see About Cascading Picklists and Picklist Value Groups (on page 194). For more information about picklist value groups, see About Picklist Value Groups (on page 229).

Before you begin. Before you create a cascading picklists definition, the parent and related picklists must exist and be visible in your page layout. The parent picklist must be visible in order to filter the related picklist values. For information about creating picklists, see Creating and Editing Fields (on page 125). To perform this procedure, your role must include the Customise Application privilege.

To create a cascading picklists definition

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Record Type Set-up section, click the link for the required record type.

4 In the Cascading Picklists section, click the required Cascading Picklists link.

The record types listed include the parent record type and related record types that have custom picklist values. For example, for opportunities there are links for Opportunity Partner, and Opportunity Competitor.

5 In the Cascading Picklists page, perform one of the following tasks:

- Click Edit or Copy to modify an existing cascading picklists definition.
- Click the New button to create a new cascading picklists definition.

The Cascading Picklists Wizard guides you through the process.

6 In Step 1 Select Picklists, select a parent picklist and a related picklist.

7 In Step 2 Select Values, you can:

- View the existing associations between a Parent Picklist value and the Related Picklist values. When you select a value in the Parent Picklist Available Values list, the available values for the related picklist are shown in the Related Picklist Available Values list, and the values that will be displayed are shown in the Related Picklist Displayed Values list. If there are no values in the Related Picklist Displayed Values list, all of the values in the related picklist will be displayed when the corresponding value in the parent picklist is selected.

  NOTE: If picklist value groups are defined for your company, then to help you to verify that your configuration of the cascading picklist correctly meets your business needs, you can select or highlight the picklist value group in the Picklist Value Group list. When you select a picklist value group, the Parent Picklist Available Values list and the Related Picklist Available Values list show only the values that are mapped to the picklist value group that you selected.

- Create a new association. Move the desired value from Related Picklist Available Values to Related Picklist Displayed Values.
- Remove an existing association. Move the value from Related Picklist Displayed Values to Related Picklist Available Values.

8 In Step 3 Confirm, you can confirm your selections of Related Picklist values for each Parent Picklist value, and then click Finish to complete defining the cascading relationship between the Parent and the Related picklists.

Clicking Finish in the wizard returns you to the Cascading Picklist List for the current record type.

After you click Finish, and add the cascading picklists definition to a page layout, it is automatically activated for all roles that include that layout.

About Cascading Picklists and Picklist Value Groups

You can use picklist fields that contain values that are mapped to picklist value groups in cascading picklists. However, in a cascading picklist definition, you can specify only one set of relationships between the values in the parent picklist field and the values in the related picklist fields, regardless of whether you select a picklist

value group in the Picklist Value Group list when you define the cascading picklist. If a field is a related field in a cascading picklist definition, and if it is also mapped to picklist value groups, then the values that are available for selection in the field when a record is created or updated are filtered first by the picklist value group on the record and then by the cascading picklist definition.

As an example, assume that you set up the following configuration for the Account record type:

- The Account Type field and the Priority field are linked in a cascading picklist definition, with the Account Type field as the parent picklist field.
- The Picklist Value Group field, the Account Type field, and the Priority field are all present on the Detail page layout.

When the Picklist Value Group field is populated on an account, the values that are available for selection in the picklist fields are as follows:

- In the Account Type field, the values that are mapped to the picklist value group are available for selection.
- In the Priority picklist field, all of the values that are mapped to the picklist value group are available until a value is selected in the Account Type field. After a value is selected in the Account Type field, the values in the Priority field are limited to those values that meet both of the following criteria:
  - The value is mapped to the picklist value group.
  - The value is linked to the value in the Account Type field in the cascading picklist definition.

Related Topics

See the following topics for related information:

- Defining Cascading Picklists (on page 193)
- About Picklist Value Groups (on page 229)
- Considerations When Setting Up Picklist Value Groups (on page 230)
- Process of Setting Up Picklist Value Groups (on page 231)
- Creating Picklist Value Groups (on page 231)
- Mapping Picklist Values to Picklist Value Groups (on page 160)

Managing Search Layouts

For most record types you can specify the fields, both standard and custom fields, which users can use when searching for records. Also, you can specify the fields that are displayed in the search results page. You specify the search fields in a search layout, and you assign a search layout for each record type to user roles as required, see Adding Roles (on page 309).

You can copy an existing search layout and then modify it to your requirements, or you can edit existing search layouts. The default search layout is read-only. You can copy it, but you cannot delete or edit it. To specify the fields that are used in searches and the fields that are displayed in the search results, you use the Search Layout Wizard.

NOTE: There are limits to the number of characters that you can use in search layout names. For more information, see About Custom Layout Limits (on page 165).

CAUTION: When you create or edit a search layout for the User record type, do not add both the Reports To field and the Reports To (Alias) field to the same search layout. If both of these fields were made available on a search layout, then searches using that search layout would fail. For more information about the Reports To and the Reports To (Alias) fields, see About the Reports To and Reports To (Alias) Fields on User Records (on page 285).

Managing the Behaviour of Lookup Windows

You can also use the Search Layout Wizard to manage the behaviour of Lookup windows and to enable smart-associations. The following options are available for configuring the behaviour of the Lookup window for each record type. All of these options are selected in the default search layout:

- **Configure Lookup Window With Default Fields**. If this check box is selected, then the fields in the default search layout are used.
- **Show Search Results When Lookup Window Opens**. If this check box is selected, then the list of available records is displayed in the Lookup window when it is opened. If the check box is deselected, then no records are displayed when the Lookup window is opened.

  NOTE: If manager visibility is enabled for the company, then the list of records in some Lookup windows can be slow to populate, and in some cases, the Lookup window might time out. To prevent a timeout, deselect the Show Search Results When Lookup Window Opens check box for the record type associated with the Lookup window. The Lookup window then displays no records, and users can specify the search criteria to find the records that they want.
- **Auto-Resolve Enabled**. If this check box is selected, then smart associations are enabled. *Smart associations* in Oracle CRM On Demand 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. When smart associations are enabled, users can type all or part of the name of the record that they want to associate with a main record in the appropriate field, and then allow Oracle CRM On Demand to automatically resolve the association. When the user tries to save the changes, Oracle CRM On Demand searches for a match for the name that the user entered. If Oracle CRM On Demand finds a unique match, then the matching record is used, and the user's changes are saved. If Oracle CRM On Demand does not find a match, or if it finds multiple potential matches, then the user is presented with a Lookup window. In the Lookup window, the user can perform additional searches, and then select the appropriate record. If smart associations are not enabled, then users must click the Lookup icon next to a field to open the Lookup window, where they can search for records.
- **Show Context-Sensitive List as Lookup Window Default**. This check box is available only if the Record-Type Lists in Lookup Windows menu is set to Enabled on the company profile. If the Show Context-Sensitive List as Lookup Window Default check box is selected and the record type has one or more context-sensitive lists, then all such lists appear before the other lists in the *record type* List field in the upper-left corner of the Lookup window. Context-sensitive lists are most likely to contain the records that users require. For more information about the *record type* List field and context-sensitive lists, see Searching for Records in Lookup Windows. For more information about the Record-Type Lists in Lookup Windows menu, see Setting Up Your Company Profile and Global Defaults (on page 19).

  NOTE: If you select Disabled in the Record-Type Lists in Lookup Windows menu on the company profile after you set up the search layouts, then the Show Context-Sensitive List as Lookup Window Default check box is no longer available in the Search Layout Wizard. Also, the context-sensitive lists are not available in Lookup windows, and the initial search for a record of a given record type in a

Lookup window is performed on all records of that record type that the user can access, regardless of whether the Show Context-Sensitive Lists as Lookup Window Default option was previously selected. However, Oracle CRM On Demand stores the setting for the Show Context-Sensitive List as Lookup Window Default check box for each search layout. If you later select Enabled or Mixed in the Record-Type Lists in Lookup Windows menu on the company profile again, then the setting for the Show Context-Sensitive List as Lookup Window Default check box for each search layout is restored and becomes effective again.

If you are creating a search layout for the Product record type, then the following option is available if you want the search layout window to display products by division:

- **Configure Lookup Window with Division as the Default Search Field.** In Oracle CRM On Demand when you create a search layout for the Product record type in the Search Layout wizard, you can configure the product search layout to list products by divisions by selecting the Configure Lookup Window with Division as the Default Search Field check box. By displaying products by division in the Product Lookup window, this allows users to perform a search within a set of relevant products, and it reduces user error when searching and selecting from a list of products. For more information, see Considerations When Creating Product Search Layouts (on page 200).

If you are creating a search layout and you want to configure the search result page of enhanced keyword search to display specific result fields for the Account, Opportunity, Contact, Appointment, and Task record types, then the following option is available:

- **Configure Enhanced Keyword Search with Selected Search Results Fields.** If this check box is selected, then the fields defined in the search layout are displayed in the search result page for enhanced keyword search. If this check box is deselected, then the key fields for the record type are displayed in the search result page.

If you are creating a search layout and you want to specify the first field in the list of targeted search fields as the default search field in the Lookup window, then the following option is available:

- **First Targeted Search Field as Default Search in Lookups.** If this check box is selected, then the first field in the list of targeted search fields in the search layout is used as the default search field in the Lookup window. If this check box is deselected, then the default search field is the same as the field on which the lookup is mapped.

Search Layout Features for Advanced Search of Related Records

When you create or edit a search layout, consider your requirements for making fields available as search fields in advanced searches of related records. When determining if a field is available for searching in an advanced search of related records of a given record type, Oracle CRM On Demand uses the following features from the search layout for the record type in certain circumstances:

- The list of available search fields in the search layout.
- The setting of the Restrict Search to Fields Selected in Related Information Layout check box in the search layout.

For information about when and how Oracle CRM On Demand uses these features to determine whether a field is available for searching in an advanced search of related records, see About Advanced Search of Related Records.

Before you begin. To manage search layouts, your role must include the Customise Application privilege.

The following procedure describes how to create or modify a search layout.

To create or modify a search layout

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the record type for which you want to create or modify a search layout.
4. In the *record type* Application Customisation page, click the *record type* Search Layout link.
5. In the Search Layout list, perform one of the following tasks:
   - Click Edit or Copy to modify an existing layout.
   - Click the New Layout button to create a new layout.
   - Click Remove to delete an existing layout not currently assigned to a role.

   The Search Layout Wizard guides you through the process.
6. In Step 1, Define Layout Name, enter or modify the name and optionally a description for the layout.
7. Click Next.

   In Step 2, Specify Search Fields, there are three lists:

   - **Not Available Search Fields.** This list displays all the fields that will not be available for search.
   - **Targeted Search Fields.** This list displays all the fields that are available for targeted search and will be displayed in the Targeted Search applet for the record type in the Action bar. The Targeted Search applet can display a maximum of ten fields. If you add more than ten fields to the list, and try to save the layout, then an error message is displayed. If you use Targeted Search fields, then the following also happens:
     - The fields are available as the prepopulated default fields in the Advanced Search criteria form.
     - The selected fields appear as the prepopulated default fields in the filter criteria when creating or refining lists.
     - The selected fields appear as the set of fields that you can search in the Lookup window.

     If no fields are specified in this list, then the record type appears in the Targeted Search applet but no search fields are displayed in the applet.
   - **Additional Search Fields.** This list displays the fields that are not displayed in the Targeted Search applet but that are available in other searches, such as advanced search. Indexed fields are displayed in green text. Indexed fields that are case-insensitive are displayed in blue text.

   NOTE: For optimal performance, use indexed fields when defining your search fields. If either the Targeted Search Fields or Additional Search Fields list contains any fields that are not optimised, then a warning message appears.

   You arrange the fields within a list by clicking the up arrow and down arrow, and you move fields between the lists by clicking the right arrow and left arrow, or up arrow and down arrow. The order of the fields in the lists is used in the Targeted Search applet in the Action bar and in the search criteria forms.

NOTE: The fields that are displayed in purple text are always case-insensitive. These fields are not optimised for fast searches.

8 In Step 2, move the fields to the Not Available Search Fields list, and arrange the fields in the Targeted Search Fields and Additional Search Fields lists, as required.

9 (Optional) In Step 2, select or deselect the Restrict Search to Fields Selected in Related Information Layout check box, as necessary, to meet your requirements for making fields available as search fields in advanced searches of related records.

For more information about this check box, see About Advanced Search of Related Records.

10 (Optional) If you plan to select the First Targeted Search Field as Default Search in Lookups check box in Step 3, then use the up arrow and down arrow to position the first field in the list of targeted search fields as required.

11 (Optional) Select the Configure Lookup Window with Division as the Default Search Field check box if you want the search layout window to display products by division.

NOTE: This option is only available when specifying a search layout for the Product record type. For more information, see Considerations When Creating Product Search Layouts (on page 200).

12 Click Next.

In Step 3, Define Search Results Layout, there are three lists:

- **Not Available Search Results Fields.** This list displays all the fields that will not be displayed in the search results.
- **Lookup Window Search Results Fields.** This list displays the fields that will be displayed in the search results for the Lookup window. This list has a limit of nine fields.
- **Additional Search Results Fields.** This list displays the extra fields, in addition to those in the Lookup Window Search Results Fields list, that will be displayed in the search results other than for Lookup window searches.

  The total number of fields allowed for the Lookup Window Search Results Fields and the Additional Search Results Fields list is 20, which means the search results cannot display more than 20 columns. For more information about searching for records, see Finding Records.

CAUTION: It is recommended that you add fields to the lists sparingly because the number of columns in the lists can affect performance. The performance varies dramatically by record type and by field type. Each additional field can increase the loading time for the list.

13 In Step 3, Define Search Results Layout, move fields to the Lookup Window Search Results Fields and Additional Search Results Fields lists, and rearrange them, as necessary.

NOTE: The Lookup Window Search Results Fields list determines the layout of the search result fields for single-association lookup windows only. You cannot specify the layout of the search result fields for multi-association lookup windows.

14 Select or deselect the following check boxes as required to configure Lookup Windows behaviour:

- Configure Lookup Window With Default Fields
- Show Search Results When Lookup Window Opens

- Auto-Resolve Enabled
- Show Context-Sensitive List as Lookup Window Default
- Configure Enhanced Keyword Search with Selected Search Results Fields
- First Targeted Search Field as Default Search in Lookups

15 Click Finish.

Related Topics

See the following topics for related information:

- Customising Related Item Layouts (on page 161)
- Customising Static Page Layouts (on page 165)
- Creating Record Homepage Layouts (on page 205)

Considerations When Creating Product Search Layouts

In Oracle CRM On Demand when you create a search layout for the Product record type in the Search Layout wizard, you can configure the product search layout to list products by divisions by selecting the Configure Lookup Window with Division as the Default Search Field check box. By displaying products by division in the Product Lookup window, this allows users to perform a search within a set of relevant products, and it reduces user error when searching and selecting from a list of products.

When you choose to display products by divisions in your product search layout:

- The Product Lookup window uses the Division field as the default search field and is prepopulated with the user's primary division, if the user has one.
- If the Show Search Results when Lookup Window Opens check box is selected, the list of products is displayed and is automatically filtered by the user's primary division. If the user has no primary division, then all products are displayed, but are not filtered.
- If the Show Search Results when Lookup Window Opens check box is not selected, no products are displayed in the Product Lookup window.

When you choose not to display products by divisions in your product search layout:

- The Product Lookup window uses the Product Name field as the default search field.
- If the Show Search Results when Lookup Window Opens check box is selected, the Product Lookup window uses the Product Name field as the default search field and all products are listed.
- If the Show Search Results when Lookup Window Opens check box is not selected, the Product Lookup window uses the Product Name field as the default search field and no products are listed.

The Division field is not automatically added to the Targeted Search applet, however you can add it to targeted search so that it is displayed in the Targeted Search applet in the Action bar.

The user cannot search for Division if it is listed in the Not Available Search Fields list. However, by selecting the Configure Lookup Window with Division as the Default Search Field check box, the user can search for it using a Lookup window only.

NOTE: When you select the Configure Lookup Window with Division as the Default Search Field check box, this setting takes precedence over the First Targeted Search Field as Default Search in Lookups check box. For more information on specifying the default search field in a Lookup window, see Managing Search Layouts (on page 195).

Related Topics

See the following topics for related information:

- Managing Search Layouts (on page 195)
- Division Set-up (see "Division Setup" on page 69)

Managing List Access and List Order

For each record type, you can specify the lists that are available for each role, and the order in which the lists are displayed on the record type's Homepage.

You can create a new layout for only those roles that you have not already customised. You can also edit or delete existing layouts. You cannot manage the list access and order for a user's private lists.

Before you begin:

Because you must select a role that this customisation applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customise Application privilege and the Manage Public Lists privilege.

To create or modify list access

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click Application Customisation.
3. In the Record Type Set-up section, click the link for the required record type.
4. In the List Access and Order section, click the *record type* List Access and Order link.
5. In the List Order Layout page, perform one of the following:
   - Click Edit or Copy to modify an existing layout.
   - Click the New Layout button to create a new layout.
6. If you are creating a new layout, select a role from the Role Name drop-down list.

   Only roles that do not already have an associated layout are available in the drop-down list.

7 Move lists between the All Lists, Lists Available for this Role and Show in Short List lists as required.

- All Lists contains all the lists for the record type, apart from private lists.
- Lists Available for this Role contains all the lists available for the role that you select. These lists are also displayed in the *record type* List field in Lookup windows for the record type.
- Show in Short List contains the lists displayed in the List section in the Homepage, in the picklist of lists in the List pages for the record type, and in the *record type* List field in Lookup windows for the record type. For more information about the *record type* List field, see Searching for Records in Lookup Windows.

8 Rearrange the order of the lists as required using the up and down directional arrows.

9 Click Save.

Creating Homepage Custom Reports

You can use the Homepage Custom Report feature to add multiple reports, including both prebuilt and custom reports, to the record-type Homepages. This feature allows you to provide the most relevant information to different users. For example, you can configure the Service Request Homepage for a customer service representative to show a custom service-request report.

For some record types, standard reports are shown on the record-type Homepage by default. You can replace the standard reports with different reports, or you can add additional reports. You can also specify Homepage reports for record types where no report is shown on the record-type Homepage by default.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 142).

To make a prebuilt or custom report available on a record-type Homepage, you first create a Homepage custom report record for the report. When you create or edit the Homepage layouts for a record type, any Homepage custom report records that you created for the record type are listed in the All Sections list in the Homepage Layout Wizard. You can then make a report available on a Homepage layout as follows:

- You can move the report to one of the lists of sections that are displayed by default in the Homepage layout, so that any user whose role has that layout automatically sees that report on their record-type Homepage.
- You can move the report to the list of Available sections in the Homepage layout, so that any user whose role has that layout and the Personalise Homepages privilege can add the report to his or her record-type Homepage.

For more information about customising Homepages, see Creating Record Homepage Layouts (on page 205). For information about creating custom reports for My Homepage, see Enabling Custom Reports in My Homepage (on page 244).

About Privileges for Managing Homepage Custom Report Records

If your role has the appropriate privileges, you can create custom report records and add them to custom Homepage layouts for all record types. The following table shows the privileges required for the various tasks involved in making a custom report available on a Homepage.

Task	Privilege Needed	Notes
(Optional) Create a custom report and publish it to a company-wide folder	Manage Custom Reports	For more information, see Getting Started with Analytics.
Create a Homepage custom report record	Customise Application Customise Application - Manage Homepage Customisation Access Migrated Company Wide Shared Folder	Instructions for this task are provided in this topic. The Access Migrated Company Wide Shared Folder privilege is required only if you want to add a report from the Migrated Company Wide Shared Folder to a Homepage custom report.
Add a custom report section to a Homepage layout	Customise Application Customise Application - Manage Homepage Customisation	For more information, see Creating Record Homepage Layouts (on page 205).
Add a Homepage layout to a user role	Manage Roles and Access	For more information, see Adding Roles (on page 309).
(Optional) Add or remove a custom report section on a Homepage (end user)	Personalise Homepages	For more information, see Changing Your Homepage Layouts.

Before you begin:

- The report that you want to enable in a Homepage must be stored under Shared Folders, in a folder to which you have access.
- If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then you can create custom reports only if the language that is selected in the Translation Language field is the default language for the company.

To create a Homepage custom report

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the link for the required record type.
4. In the Homepage Layout Management section, click *record type* Homepage Custom Report.
5. Click New Homepage Report.
6. On the Homepage Custom Report Detail page, complete the following fields.

Field	Comments
Name	Enter the name of the custom report.
Mark for Translation	This check box is available only if the Enable Language Translation Support for Web Applets check box is selected on the company profile. When you create a custom report, the Mark for Translation check box is selected and read-only. Also, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Field in the list of custom reports before you update an existing custom report. If you change the name of an existing custom report in the default language for the company, then use the Mark for Translation check box as follows: ■ If you want the translated versions of the name to be replaced by the updated name, then select the Mark for Translation check box. ■ If you want the translated versions of the name to remain unchanged, then do not select the Mark for Translations check box. For more information about translating custom report names, see Translating Web Applet and Custom Report Names (on page 191).
Height	Select Single or Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.
Width	Select Single or Double. If you want the report to span the entire Homepage from left to right, set the width to Double. **NOTE:** Reports that have an HTML RowSpan attribute value of more than 2 sometimes span beyond the specified size.
Execute Report Immediately	If you select this check box, the report will run automatically, and users will not have to click a link to update the report.
Catalogue	Select the catalogue for the report that you want to embed.

1 Click the Lookup icon (magnifying glass), and then navigate to the report you require in Shared Folders.

The Report Path field is automatically populated after you select the report.

2 In the Description field, enter a description for the homepage custom report.

3 Click Save.

Creating Record Homepage Layouts

You can create custom Homepage layouts for all record types. This feature allows you to provide the most relevant information to different users, including the ability to display custom reports on record type Homepages. For example, you can configure the Service Request Homepage for a customer service representative to show the user's current service-request-related task and a custom service-request report.

NOTE: If you want to use a prebuilt or custom report in a custom Homepage layout, you must first create a Homepage custom report record for the report, using the procedure described in Creating Homepage Custom Reports (on page 202).

You can copy an existing Homepage layout and then modify it to your requirements. You can also edit existing Homepage layouts, with the exception of the default Homepage layout, which is read-only. You can copy the default Homepage layout, but you cannot delete or edit it.

NOTE: The number of characters that you can use in Homepage layout names is limited. For more information, see About Custom Layout Limits (on page 165).

After you create a custom Homepage layout, you must use the Role Management Wizard to assign the layout to the user roles that need to use that layout. Users whose role includes the Personalise Homepage privilege can customise their own Homepage layout for a record type. The customised layout can display any of the sections that you make available to them in the Homepage layout that is assigned to the users' role for that record type.

Before you begin. To perform this procedure, your role must include the Customise Application privilege and the Customise Application – Manage Homepage Customisation privilege.

To create or modify a Homepage layout

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Record Type Set-up section, click the link for the required record type.

4 In the Homepage Layout Management section, click the *record type* Homepage Layout link.

5 In the Homepage Layout list, perform one of the following:

- Click Edit or Copy to modify an existing layout.
- Click the New Layout button to create a new layout.

The Homepage Layout Wizard appears to guide you through the process.

6 In Step 1 Layout Name, enter a name for the layout, and a description if required.

7 In Step 2 Homepage Layout, specify the available and displayed sections as follows:

- Move sections from the All Sections list to the Available Sections list.

  The Available Sections list includes the sections that can be added to a Homepage. If you do not want a user to be able add a section to a Homepage, leave the section in the All Sections list.

- Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

  Leave sections that are double width in the Left Side list. They automatically stretch across the Homepage when it is displayed.

8 Click Finish.

NOTE: After you add a custom Homepage layout to the application, you need to make it available to a user role before users can see it. For more information on adding and modifying user roles, see Adding Roles (on page 309). Users whose role has the Personalise Homepage privilege can edit the layout of their Homepages with any list or report you make available to them in the Homepage layout assigned to their role for that record type.

Customising the Audit Trail

For many record types, you can use the audit trail to track the creation, deletion, and restoration of records, and also to track updates to specified fields on existing records. An audit trail record shows the details of the user whose action triggered the audit trail record, the type of action that was performed, and a timestamp. When an audited field on an existing record is updated, the audit trail record for the change to the field shows the old and new values for the field.

NOTE: If none of the audited fields is updated when a record is updated, then no audit trail record is generated for the operation.

Company Settings for the Audit Trail

The length of time that the audit trail records are retained in Oracle CRM On Demand is specified in the Audit Expiry (Days) field in the company profile. In the standard application, the records are retained for 90 days, but administrators can specify a different length of time.

The maximum number of fields that you can audit for a record type is specified in the Record Type Auditable Fields field in the company profile. In the standard application, the maximum is 35 fields, but administrators can change this limit.

NOTE: The maximum number of fields that can be audited for a record type is shown in the Audit Field Setup page for each record type, but the value cannot be changed in that page.

For information about changing the company settings for the audit trail, see Configuring Company Settings (on page 21).

Auditing Takes More Time and Resources

Auditing adds processing time to an operation, because the auditing rules must be evaluated when the operation is performed. For update operations, an audit trail record must be generated and stored for each

audited field that is updated, so the more fields that you audit on a record type, the longer it takes to save a record of that type.

Audit Trail Configuration

For each of the record types that support the audit trail, you can specify the following:

- Which fields you want to audit.
- Whether you want to track the creation of records.

  NOTE: You cannot deselect the option to track the creation of records in the User audit trail.

- For records that can be deleted, whether you want to track the deletion and restoration of those records.

  NOTE: The option to track the deletion and restoration of records is not available for the User and User Partner Admin audit trails, because such records cannot be deleted.

The audit trail for a record type is enabled as soon as you specify that at least one field is to be audited for the record type, or you select one of the options to track the creation, deletion, and restoration of records.

About Making Audit Trail Records Visible to Users

The audit trail records appear in the Audit Trail related information section in record Detail pages, as described in Viewing Audit Trails for Records. To make the audit trail records visible to users, you must do the following:

- Add the Audit Trail related information section to the relevant layouts for the record Detail page for a record type.

  NOTE: The Audit Trail related information section is not available to add to page layouts for the Asset and Revenue record types. Audit trail information for these record types can be viewed in the Master Audit Trail only.

- Update the relevant user access profiles to allow access to the audit trail records. For example, to allow a user to view the audit trail records on accounts, give the user read-only access to the Audit Trail related information type for the Account record type. For more information about access profiles, see Process of Setting Up Access Profiles (on page 332).

Administrators can also view the full set of audit trail records for all audited record types in the Master Audit Trail, as described in Reviewing Audit Trail Changes with the Master Audit Trail (on page 79).

Record Types Audited by Default

The audit trail is enabled by default for the Opportunity and Service Request record types when a company is first set up. In addition, for certain record types that are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition, the audit trail is enabled when the record type is enabled for the company. For all of these record types, the audit trail is set up as follows:

- Certain fields are audited. You can add fields to the list of audited fields, and remove fields from the list.
- The option to track the creation of records and the option to track the deletion and restoration of records are selected. You can change these settings.

For the Opportunity and Service Request record types only, the following items are set up by default:

- The Audit Trail related information section is available in the standard Detail page layout.
- All of the standard access profiles provide read-only access to the audit trail records.

The audit trail is also enabled by default for the User record type when a company is first set up. Certain mandatory fields are audited by default. The option to track the creation of records is also selected, and you cannot change this setting.

The following table lists the record types that support the audit trail, and shows whether the audit trail is enabled for the record type by default. It also lists the fields that are audited by default.

NOTE: If you remove all fields from the list of audited fields for a record type, and if you also deselect the options to track the creation, deletion, and restoration of records, then the audit trail is disabled for the record type.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Account	No	No fields are audited by default.
Accreditation	No	No fields are audited by default.
Activity	No	No fields are audited by default.
Address	No	No fields are audited by default.
Allocation	No	No fields are audited by default.
Application	Yes	Annual Revenue, Application ID, Approval Status, Approved Date, Campaign, Current Approver, Email Address, Existing Partnerships, Expected Partnership Benefits, First Name, Last Name, Location, Main Fax (#), Main Phone (#), Name, Number of Employees, Partner, Partner Programme, Partner Type, Programme Level, Reject Reason, Source, Submission Status, Work Fax (#), Work Phone (#).
Asset	No	No fields are audited by default.
Blocked Product	No	No fields are audited by default.
Broker Profile	No	No fields are audited by default.
Business Plan	No	No fields are audited by default.
Campaign	No	No fields are audited by default.
Certification	No	No fields are audited by default.
Claim	No	No fields are audited by default.
Contact	No	No fields are audited by default.
Contact State Licence	No	No fields are audited by default.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Course	No	No fields are audited by default.
Coverage	No	No fields are audited by default.
Custom Objects 01 or higher	No	No fields are audited by default.
Damage	No	No fields are audited by default.
Deal Registration	Yes	Approval Status, Associated Contact, Associated Customer, Associated Lead, Associated Opportunity, Cell Phone, City, Close Date, Company Name, Country, Currency, Current Approver, Deal Size, Email, Expiration Date, Fax, First Name, Last Name, Name, Originating Partner Account, Partner Programme, Postal Code, Principal Partner, Product Interest, Reject Reason, State, Street, Submission Status, Telephone (#), Type.
Dealer	No	No fields are audited by default.
Event	No	No fields are audited by default.
Exam	No	No fields are audited by default.
Financial Account	No	No fields are audited by default.
Financial Account Holder	No	No fields are audited by default.
Financial Account Holding	No	No fields are audited by default.
Financial Plan	No	No fields are audited by default.
Financial Product	No	No fields are audited by default.
Financial Transaction	No	No fields are audited by default.
Fund	Yes	Owner, Partner, Status, Target Amount.
Fund Request	Yes	Approved, Claim Decision Date, Claim Req., Due Date, Fund, Granted, Owner, Pre-Approval Date, Pre-Approval Req., Status.
HCP Contact Allocation	No	No fields are audited by default.
Household	No	No fields are audited by default.
Insurance Property	No	No fields are audited by default.
Inventory Audit Report	No	No fields are audited by default.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Inventory Period	No	No fields are audited by default.
Invitee	No	No fields are audited by default.
Involved Party	No	No fields are audited by default.
Lead	No	No fields are audited by default.
MDF Request	Yes	Amount Preapproved, Amount Requested, Approval Status, Claim Decision Date, Claim Status, Fund, Pre-Approval Date, Submission Status, Submitted Date, Total Claim Amount Approved, Total Claim Amount Requested.
Messaging Plan	No	No fields are audited by default.
Messaging Plan Item	No	No fields are audited by default.
Messaging Plan Item Relations	No	No fields are audited by default.
Objective	No	No fields are audited by default.
Opportunity	Yes	Close Date, Forecast, Owner, Probability (%), Revenue, Sales Stage.
Order	No	No fields are audited by default.
Partner	No	No fields are audited by default.
Partner Programme	No	No fields are audited by default.
Plan Account	No	No fields are audited by default.
Plan Contact	No	No fields are audited by default.
Plan Opportunity	No	No fields are audited by default.
Policy	Yes	Face Amount. For more information, see Policy Fields.
Policy Holder	No	No fields are audited by default.
Portfolio	No	No fields are audited by default.
Product Indication	No	No fields are audited by default.
Quote	No	No fields are audited by default.
Revenue	No	No fields are audited by default.
Sample Disclaimer	No	No fields are audited by default.
Sample Lot	No	No fields are audited by default.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Sample Request	No	No fields are audited by default.
Sample Request Item	No	No fields are audited by default.
Sample Transaction	No	No fields are audited by default.
Service Request	Yes	Area, Cause, Description, Owner, Priority, Source, Status, Subject, Type.
Signature	Yes	Contact
Social Media	No	No fields are audited by default.
Social Profile	No	No fields are audited by default.
Solution	No	No fields are audited by default.
Special Pricing Request	Yes	Approval Status, Authorised Date, Claim Decision Date, Claim Status, Submission Status, Submitted Date, Total Amount Authorised, Total Amount Requested, Total Claim Amount Approved, Total Claim Amount Req.
User	Yes	Always Send Critical Alerts, Authentication Type, Email, External Identifier for Single Sign-On, Role, Status, User Sign In ID.
User Partner Admin	No	No fields are audited by default. As a best practice audit the following fields: Always Send Critical Alerts, Authentication Type, Email, External Identifier for Single Sign-On, Role, Status, User Sign In ID. **NOTE:** In the Master Audit Trail, the changes that are made to user records through the partner self-administration pages are displayed with the User Partner Admin record type.
Vehicle	No	No fields are audited by default.

The following considerations apply to fields regarding auditing:

- For the User audit trail, the mandatory fields are displayed in red text in the list of audited fields. You cannot save the User Audit Trail if you remove any of the mandatory fields from the list of audited fields.
- For foreign key fields, the name (not the ID) is stored and displayed in the audit trail. For example, if the Account field on the Opportunity record type is audited, then the audit trail displays the account name instead of the Row ID.
- No address fields are available for any of the auditable record types.

- Picklist fields show the user's language dependent values (LDVs).
- ID columns that are not displayed on the layouts are not available for auditing.

The following procedure describes how to customise the audit trail for a record type.

Before you begin. To perform this procedure, your role must include all of the following privileges:

- Customise Application
- Administer Field Audit
- Manage Roles and Access

To customise the audit trail for a record type

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the link for the required record type.
4. In the Field Audit Setup section, click the *record type* Field Audit Setup link.
5. (Optional) Select Audit *record type* Record Creation if you want to track the creation of records in the audit trail.
6. (Optional) Select Audit *record type* Record Deletion/Restore if you want to track the deletion or restoration of records in the audit trail.
7. In the Audit Field Set-up page, move fields from the Available fields list to the Audited Fields list as required.

   An error message is displayed if you exceed the company limit.

   The Available Fields list contains all the standard and custom fields for the record type that are not already audited.
8. Click Save.

   Auditing of a field becomes effective immediately after it is enabled.

NOTE: The Invitee record type is a child record type of the Event record type. You can customise the audit trail fields for the Invitee record type and configure the Audit Trail related information section for the Invitee record type through the Application Customisation pages for the Event record type. You can add the Audit Trail related information section for the Invitee record type to Invitee Detail page layouts only. You cannot add the Audit Trail related information section for the Invitee record type to Event Detail page layouts. Also, to allow users to view the audit trail for invitee records, you must update the relevant access profiles to give users read-only access to the Invitee Audit Trail related item for the Event parent record type.

About the Information in Modified Fields on Records

Oracle CRM On Demand uses the following system fields to store information about the most recent change to a record:

- Modified External
- Modified: Date
- Modified By
- Modified: Date External

In certain cases, Oracle CRM On Demand writes information to one or more of these fields to reflect a change to the record that is not caused by an explicit user action. For this reason, it is recommended that you do not rely on the information in these fields to track the changes that users make to records. Instead, use the audit trail feature to track the changes that users make to specific fields on records. For information about customising the audit trail for record types, see Customising the Audit Trail (on page 206). For information about viewing the changes to field set-up, roles, and access profiles, see Reviewing the Audit Trail for Administration Configuration Changes (on page 81).

The following is an example of a system change to the Modified By field on a record. A user deletes an account that is linked to a contact record as the primary account for the contact. When the deleted account record is purged from the database, the link between the deleted account and the contact is removed from the database. After the link is removed from the database, the next time that the contact record is opened by any user, Oracle CRM On Demand selects another linked account as the primary account on the contact and writes the ID of the account to the primary account field. Or, if there are no accounts linked to the contact, then Oracle CRM On Demand updates the record to reflect that. Oracle CRM On Demand then updates the Modified By field with the name of the user who opened the contact record.

In addition, in the case of records that are owned by a group, the information in the system fields on the record might be updated automatically after a user is deleted from the group. If the name of the user who is deleted from the group appears in the Owner field on a shared record that the group owns, then the name in the Owner field on that record is changed to the name of another member of the group after the previous owner is deleted from the group. When such a change is made to the ownership of an opportunity record or a portfolio record, the system fields that store information about the most recent change to the record are updated, and the information shows that the record was updated by the Oracle Administrator user. However, in the case of the other record types that support groups, the system fields are not updated. For all record types that support groups, the change to the Owner field on the shared record is not tracked in the audit trail when the field is changed as a result of the user being deleted from the group, even if the Owner field is set up to be audited for the record type.

The Modified By field on a record can also show the name of a user who does not have the necessary access rights and privileges to update the record directly. For example, when the status of a user is changed from Active to Inactive or from Inactive to Active, the values in the Active Users and Inactive Users fields on the Company Profile page are updated. As a result of the changes to these fields, the Modified By field on the Company Profile page is updated to show the name of the user who updated the user record, even if the user who made that change does not have the necessary privilege to update the company profile.

Specifying Dynamic Page Layouts

Dynamic layouts streamline the application for end users by allowing them to manage only the subset of information that is relevant in a given situation. For example, your company might track several different types of accounts, such as customer-type accounts, prospect-type accounts, or partner-type accounts. With

the dynamic page layout feature, you can configure different layouts that show a different set of account fields and related items, based on the type of account. You can then associate the different layouts with one or more user roles. When the user drills down on a particular account record, the user is shown the appropriate page layout, based on the user's role and the type of account.

When you define dynamic page layouts for a record type, a predefined picklist value is used to drive the dynamic rendering of the page layouts. You specify a page layout to be displayed for each value of the picklist. The users can then see different page layouts for different records of the same record type, based on the picklist value that they select in the record.

NOTE: When using dynamic layouts, you cannot use picklist values that are identical to internal picklist IDs as this can result in unpredictable behaviour.

You must associate your dynamic page layouts with user roles as required. There is a many-to-many relationship between dynamic page layouts and user roles.

Each picklist value has only one layout associated with it, but a page layout can be associated with multiple picklist values. There is a limit of 200 associations between picklist values and page layouts. You cannot delete a layout that is already associated with a user role.

Caution: It is recommended that all dynamic layouts associated with a driving picklist include the driving picklist. If one of your assigned layouts does not have the driving picklist, and the picklist value associated with that layout is selected and saved for a record, you will not see the driving picklist on the layout, and so you cannot edit the field.

The following table shows the predefined driving picklist values for each record type.

Record Type	Driving Picklist
Account	Account Type
Activity: Appointment	Type
Activity: Task	Type
Appointment	Type
Asset	Asset Type
Business Plan	Type
Call Activity	Type
Campaign	Campaign Type
Contact	Contact Type
Custom Objects 01-03	Type
Custom Objects 04 or higher	Type
Deal Registration	Type
Dealer	Status
Event	Type

Record Type	Driving Picklist
Fund	Status
Fund Request	Status
Household	Segment
Inventory Audit Report	Type
Lead	Lead Source
Med Ed	Type
Message Plan Response	Type
Messaging Plan	Type
Messaging Plan Item	Type
Messaging Plan Item Relation	Type
Objectives	Type
Opportunity	Opportunity Type
Opportunity Product Revenue	Type
Partner	Partner Organisation Status
Partner Programme	Partner Type
Policy	Line of Business
Portfolio	Account Type
Revenue	Type
Revenue: Account Revenue	Type
Revenue: Contact Revenue	Type
Sample Transaction	Type
Service Request	Type
Solution	Status
Task	Type
Vehicle	Product Type
Vehicle Finance Info	Finance Type

The number of characters that you can use in page layout names is limited. For more information, see About Custom Layout Limits (on page 165).

Page Layouts and Lists

You can use page layouts and role privileges to limit the fields that users can search, view in lists, and export. When a user creates or refines a list of records or uses advanced search to find records, the privileges and page layouts assigned to the user's role determine which fields the user can search and view.

If the All Fields in Search and Lists privilege is enabled for the user's role, then the user can search all of the search fields that are made available in the search layout that is assigned to the user's role for the record type. Also, when creating or refining a list, the user can select any field to display it as a column in the list of records that is returned by the search.

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

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

- The field is an available search field in the search layout that is assigned to the user's role for the record type.
- The field is displayed on the Detail page layout that is assigned to the user's role for that record type. If dynamic page layouts are defined for the role, then the field must be displayed on at least one of the dynamic page layouts.

Also, when creating or refining a list, the user can select a field to display it as a column in the list of records that is returned by the search only if the field is displayed on at least one of the Detail page layouts, including dynamic page layouts, that are assigned to the user's role for the record type. This restriction also affects what the user can export in a list. If the List - Export Displayed Fields privilege is enabled on the user's role, but the List - Export All Fields privilege is not enabled, then the user can export only the fields that are displayed in the list. The user cannot export all fields on the records in the list.

NOTE: In the case of advanced searches that users start from the Advanced link in a list of related records on a parent record, additional considerations apply to the availability of search fields and the fields that can be displayed in the search results. For more information, see About Advanced Search of Related Records.

Before you begin. To perform this procedure, your role must include the Customise Application privilege and the Customise Application - Manage Dynamic Layouts privilege.

To create or modify a dynamic page layout

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Type Set-up section, click the link for the required record type.
4. In the Dynamic Layout Management section, click the *record type* Dynamic Layout link.
5. In the Dynamic Page Layout list, perform one of the following:
   - Click Edit or Copy to modify an existing layout.
   - Click the New Layout button to create a new layout.

The Dynamic Layout Wizard guides you through the process.

6 In Step 1 Layout Name:

a Enter a name for the Dynamic Layout.

b Select a Default Layout. This layout is presented as the default layout in the next step.

The Driving Picklist field shows the picklist whose values determine which layout is seen by the users.

7 In Step 2 Assign Layouts, associate each of the picklist values with a layout name.

NOTE: For each dynamic page layout, there is a limit of 200 associations between driving picklist values and page layouts.

The layout you select is displayed when a record has the corresponding picklist value.

8 Click Finish.

Related Topics

For information about how personalised page layouts interact with dynamic page layouts:

- How Personalised Related Information Layouts Interact with Page Layouts for Roles (on page 217)
- How Personalised Field Layouts Interact with Page Layouts for Roles (on page 222)

How Personalised Related Information Layouts Interact with Page Layouts for Roles

Each user role has an assigned page layout for each record type. Page layouts determine the fields, page sections, and related information sections that users can see on the pages where they create, view, and edit records of the various record types. Users can personalise the layout of the related information sections on the Detail page for a record type if the Personalise Detail Page - Related Information privilege is enabled for their user role. Users can show or hide the related information sections and can also change the order in which the related information sections appear on the Detail page.

NOTE: Depending on the setup of their user role, users might also be able to personalise the field layout on record pages. For more information, see How Personalised Field Layouts Interact with Page Layouts for Roles (on page 222).

If necessary, you can reset any personalised versions of the page layouts to the default settings for a role. For more information, see Resetting Personalised Page Layouts (on page 336).

How Personalised Related Information Layouts Interact with Static Page Layouts

When a static page layout is used, a user sees the same layout for all records of a given record type. When a user creates a personalised layout of the related information sections for a static Detail page layout, the behaviour is as follows:

- After the user changes the layout of the related information sections on the Detail page for a record type, the user's personalised layout is used each time that the user opens the Detail page for a record of that type.
- The user's personalised layout of the related information sections continues to be used for all records of that record type until one of the following actions occurs:
  - The user edits the personalised layout of related information sections again.
  - The user resets the layout to the default page layout for the user's role.

    NOTE: Restoring a field layout to the default layout does not affect any personalised layouts of related information sections. Similarly, restoring a personalised layout of related information sections to the default layout does not affect any personalised field layouts for the record type.
  - The company administrator resets the page layout for the user's role to the default page layout.

    NOTE: If an administrator resets the page layout for a record type to the default layout for a role, then all of the personalised field layouts and all of the personalised layouts of the related information sections for that record type are restored to the default for users who have that role. However, if an administrator assigns a new page layout for a record type to a role, then all users who have that role see the new field layout for the record type, but the users continue to see their personalised layouts of the related information sections for the record type until they restore their related information layouts to the default layout.
- If the company administrator makes changes to the lists of available and displayed related information sections in a default page layout for a user role, then the behaviour is as follows:
  - If the company administrator moves a related information section that was previously unavailable to the list of displayed sections or the list of available sections in the default page layout, then the section is not automatically displayed in the user's corresponding personalised layout. If the user wants the newly available section to be displayed, then the user must edit the personalised layout to add the section to the list of displayed sections.
  - If the company administrator moves a related information section from the list of displayed sections to the list of available sections in the default page layout, and if that section is already displayed in a user's personalised layout, then the section continues to be displayed to the user until the user removes the section from the list of displayed sections in the personalised layout or resets the layout to the default layout.
  - If the company administrator moves a related information section to the list of unavailable sections in the default page layout, and if that section is already displayed in a user's personalised layout, then the section continues to be displayed in the record Detail page for that user. However, the next time the user edits the personalised layout for the Detail page, the section no longer appears in the list of displayed sections for the layout, and after the user clicks Save in the Personal Layout page, the unavailable section is removed from the layout and is no longer displayed in the record Detail page.

How Personalised Related Information Layouts Interact with Dynamic Page Layouts

For some record types, company administrators can create dynamic page layouts. In dynamic page layouts, a picklist value in a field on a record is used to determine the dynamic rendering of the page layout for the record. For example, your company might want users to see a certain layout for the Detail pages for accounts where the account type is Customer, and might want users to see a different page layout for accounts where

the account type is Competitor. In that case, your company administrator can set up a dynamic page layout for the Account Detail page and assign it to user roles as necessary.

When dynamic layouts are used, the Enable Personalisation of Individual Dynamic Page Layouts check box on the company profile determines whether a user can create only one personalised layout of the related information sections for a record type, or can create multiple personalised layouts for a record type. The behaviour of the Enable Personalisation of Individual Dynamic Page Layouts check box is as follows:

- If the Enable Personalisation of Individual Dynamic Page Layouts check box is deselected on the company profile, then a user can create only one personalised layout of the related information sections for a record type. The user's personalised layout of the related information sections is used for the Detail page for all records of that record type regardless of the value in the picklist field that determines the dynamic rendering of the page layout.

  For example, assume that a dynamic layout is used for the Account record type as described earlier. If a user changes the layout of the related information sections while working in the Detail page of an account that has the Competitor account type, then the personalised layout of the related information sections is used in the Detail page for all account records, regardless of the account type.

  After the layout is personalised, any further changes that the user makes to the personalised layout are reflected in the Detail page for all records of that type. If the user resets the layout of the related information sections for the record type to the default layout for the user's role, then the dynamic page layouts for the record type are used for the Detail record pages.

  For example, assume that a dynamic layout is used for the Account record type as described earlier. After a user resets the layout of the related information sections for the Account record type to the default layout for the user's role, the appropriate dynamic page layout for the account type, Competitor or Customer, is used.

- If the Enable Personalisation of Individual Dynamic Page Layouts check box is selected on the company profile, then a user can choose to create a personalised layout of the related information sections for each of the values in the picklist field that determines the dynamic rendering of the page layout. The user’s personalised layout for a picklist value is used each time that the user opens a record of that type in which that picklist value is selected.

  After the user creates a personal layout of the related information sections for a picklist value, the user can change the personalised layout again or can create personalised layouts for other values in the picklist. The user can also choose to reset the layouts of the related information sections for all picklist values to the default page layouts.

Regardless of the setting in the Enable Personalisation of Individual Dynamic Page Layouts check box on the company profile, the interaction between a user’s personalised layouts of the related information sections and the page layouts for the user’s role is as follows:

- If the company administrator makes changes to the lists of available and displayed related information sections in a default page layout for a user role, then the behaviour is as follows:
  - If the company administrator moves a related information section that was previously unavailable to the list of displayed sections or the list of available sections in the default page layout, then the section is not automatically displayed in the user's corresponding personalised layout. If the user wants the newly available section to be displayed, then the user must edit the personalised layout to add the section to the list of displayed sections.
  - If the company administrator moves a related information section from the list of displayed sections to the list of available sections in the default page layout, and if that section is already displayed in a user's personalised layout, then the section continues to be displayed to the user until the user

removes the section from the list of displayed sections in the personalised layout or resets the layout to the default layout.

- If the company administrator moves a related information section to the list of unavailable sections in the default page layout, and if that section is already displayed in a user's personalised layout, then the section continues to be displayed in the record Detail page for that user. However, the next time the user edits the personalised layout for the Detail page, the section no longer appears in the list of displayed sections for the layout, and after the user clicks Save in the Personal Layout page, the unavailable section is removed from the layout and is no longer displayed in the record Detail page.

About Changing the Enable Personalisation of Individual Dynamic Page Layouts Option

Company administrators can change the setting of the Enable Personalisation of Individual Dynamic Page Layouts check box on the company profile. If you change the setting of the check box, then the layouts of the related information sections that users see might be affected. The behaviour that a user sees when the setting is changed depends on the following:

- Whether the check box was previously selected, thus allowing the user to create personalised layouts of related information sections for individual picklist values for a record type.
- Whether the user previously created either a single personalised layout or multiple personalised layouts of related information sections for pages where dynamic layouts are used.

The following table shows the behaviour that a user sees when the Enable Personalisation of Individual Dynamic Page Layouts check box is currently deselected, and you select it.

User Previously Created a Single Personalised Layout for a Record Type?	User Previously Created Personalised Layouts for Individual Picklist Values for a Record Type?	Behaviour After the Check Box Is Selected
Yes	No	The user sees the set of default dynamic page layouts assigned to the role for the record type.
Yes	Yes	The user sees the personalised layouts that the user previously created for the individual picklist values.
No	No	The user sees the set of default dynamic page layouts assigned to the role for the record type.

User Previously Created a Single Personalised Layout for a Record Type?	User Previously Created Personalised Layouts for Individual Picklist Values for a Record Type?	Behaviour After the Check Box Is Selected
No	Yes	The user sees the personalised layouts that the user previously created for the individual picklist values.

The following table shows the behaviour that a user sees when the Enable Personalisation of Individual Dynamic Page Layouts check box is currently selected, and you deselect it.

User Previously Created a Single Personalised Layout for a Record Type?	User Previously Created Personalised Layouts for Individual Picklist Values for a Record Type?	Behaviour After the Check Box Is Deselected
Yes	No	The user sees the single personalised layout that the user previously created.
Yes	Yes	The user sees the single personalised layout that the user previously created.
No	No	The user sees the set of default dynamic page layouts assigned to the role for the record type.
No	Yes	The user sees the set of default dynamic page layouts assigned to the role for the record type.

NOTE: If the personalised layouts that your users created in the past are likely to be different from the current default layouts, then you might want to reset the page layouts for a role to the default layouts after you change the setting of the Enable Personalisation of Individual Dynamic Page Layouts check box. However, resetting the page layouts for a role resets any personalised field layouts to the default layout, as well as resetting the layouts of the related information sections. Alternatively, you might recommend that users reset their layouts of the related information sections to the default.

Related Topics

For more information about page layouts, see the following topics:

- Customising Static Page Layouts (on page 165)
- Specifying Dynamic Page Layouts (on page 213)
- Resetting Personalised Page Layouts (on page 336)
- How Personalised Field Layouts Interact with Page Layouts for Roles (on page 222)

How Personalised Field Layouts Interact with Page Layouts for Roles

Users can personalise the field layout on the Detail page for a record type when their user role is set up as follows:

- The Personalise Detail Page - Fields privilege is enabled for the role.
- A custom page layout is assigned to the role for the record type.

NOTE: If the standard layout is assigned to a role for a record type, then users cannot personalise the field layout for that record type. Also, you cannot configure a user role so that users can personalise some, but not all, of the custom page layouts that are assigned to their role. If the user role includes the Personalise Detail Page - Fields privilege, then the users who have that role can personalise all of the custom page layouts that are assigned to the role.

When you set up custom page layouts, you can specify that certain fields must always appear on the layout. With the exception of required fields and the fields that you specify must always appear on the layout, users can show or hide the fields on their personalised layout. Users can also change the order in which the fields appear on the Detail page. Users cannot add any fields that do not appear on the default layout to their personalised layout. Users can personalise the field layouts for both static and dynamic layouts.

NOTE: Depending on the setup of their user role, users might also be able to personalise the layout of the related information sections on record Detail pages. For more information, see How Personalised Related Information Layouts Interact with Page Layouts for Roles (on page 217).

After a user creates a personalised field layout, that layout is used each time that the user opens or edits a record of that record type until one of the following actions occurs:

- The user changes the field layout again.
- The user restores the default field layout for the page.

  NOTE: Restoring a field layout to the default layout does not affect any personalised layouts of related information sections. Similarly, restoring a personalised layout of related information sections to the default layout does not affect any personalised field layouts for the record type.

- The administrator resets the page layout for the user's role to the default layout, or assigns a different layout to the role for that record type.

  NOTE: If an administrator resets the page layout for a record type to the default layout for a role, then all of the personalised field layouts and all of the personalised layouts of the related information sections for that record type are restored to the default for users who have that role. However, if an administrator assigns a new page layout for a record type to a role, then all users who have that role see the new field layout for the record type, but the users continue to see their personalised layouts of

the related information sections for the record type until they restore their related information layouts to the default layout.

About Field Layouts in New Record Pages

A user's personalised layout is also used in the pages where the user enters information for a new record of that record type, unless a custom layout for the new record page is assigned to the user's role for the record type. If a custom layout for the new record page is assigned to the user's role for use in all cases, then the user's personalised layout is never used for the new record pages. However, if the user's role specifies that the custom layout for the new record page is used only when the user creates a record from the Action bar or global header, then the user's personalised field layout is used when the user creates a record from any other area in Oracle CRM On Demand.

What Happens If a Page Layout Changes After Users Personalise the Field Layout?

After users who have a certain role personalise their field layout for a record type, an administrator might make a change to the default layout for the role. Depending on the change that the administrator makes, the changes to the layout interact with the personalised layouts as follows:

- If the administrator assigns a different Detail page layout to the role for the record type, then all users who have the role see the new field layout for the record type the next time they sign in to Oracle CRM On Demand. However, if the administrator later reassigns the original page layout to the role again, then users again see their personalised versions of that layout.
- If an administrator makes a change to the presence, layout, or characteristics of the fields on the field layout for the Detail page that is assigned to the role, then the change is not automatically applied to the personalised layouts. For example:
  - If an administrator removes a field from the Detail page layout, then the field is not removed from the personalised layouts. Also, if a user opens the Personal Layout - Fields page for that page layout, then the field that the administrator removed continues to be available, either in one of the sections in the layout or in the Available Fields list, as specified by the user.
  - If an administrator adds a field to the Detail page layout, then the new field does not appear on the personalised layouts. Also, if a user opens the Personal Layout - Fields page for that page layout, then the field that the administrator added does not appear in any of the sections in the layout or in the Available Fields list.
  - If an administrator changes the characteristics of a field, then the change is not automatically reflected in the personalised layouts. For example, if an administrator makes a field required that was not previously required in the page layout, then the field does not become a required field for users who have personalised their layout. Similarly, if an administrator selects the Always On Layout check box for a field, then the user is not forced to show the field on their personalised layout, even if the user makes further updates to the personalised layout after the administrator makes the change.

If an administrator wants the changes to the field layout to apply to all users who have the role, then the administrator must reset the page layout to the default layout for the role. Alternatively, users can reset their page layout to the default and then optionally personalise the layout again.

Related Topics

For more information about page layouts, see the following topics:

- Customising Static Page Layouts (on page 165)
- Specifying Dynamic Page Layouts (on page 213)
- Resetting Personalised Page Layouts (on page 336)
- How Personalised Related Information Layouts Interact with Page Layouts for Roles (on page 217)

About URL Standardisation

In Oracle CRM On Demand, various URLs have been standardised for all record types, so the following URLs when used in Web links, Web tabs, and Web applets will work for future releases of Oracle CRM On Demand:

- Opening a record type homepage
- Opening a record detail page using a record ID
- Opening a record edit page using a record ID
- Creating or editing a record with a prepopulated driving picklist field value to determine the page layout
- Creating or editing a record with prepopulated values for the parent picklist and related picklist of a cascading picklist field
- Updating an opportunity record to update the Sales Stage field to start a sales process

Related Topics

See the following topics for related information:

- Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 224)
- About Custom Web Applets (on page 175)
- Creating Web Applets for Record Types (on page 177)
- Creating Global Web Applets (on page 234)
- Setting Up Web Links (on page 138)
- Working with RSS Feed Applets

Displaying External Web Pages, Reports, and Dashboards in Tabs

You can display Web content in a tab within Oracle CRM On Demand. The Web content can be external Web pages or company data available from the Web. For example, you might track inventory information in another Web application, which you want to make available to your service representatives when they are

working in Oracle CRM On Demand. To address this requirement, you can create a custom Web tab to display your external Web application within the main content area of Oracle CRM On Demand. You can also embed reports and dashboards from the Analytics catalogue in custom Web tabs.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 142).

You can also create custom Web applets to contain Web content, reports, and dashboards. For information about custom Web applets and how they compare with custom Web tabs, see About Custom Web Applets (on page 175).

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (see "Important Considerations for Customers Using Customised Code in Oracle CRM On Demand" on page 235).

To make a custom Web tab visible, you must add the tab to the required user role using the Role Management Wizard.

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

Before you can display external information on an Oracle CRM On Demand page, you must ensure that:

- The external application has a Web interface
- The external application or Web page does not require full control of the browser window

To embed a report or dashboard in a Web tab, the report or dashboard must be stored under Shared Folders, in a folder to which you have access.

NOTE: You must ensure Web services are enabled for your company if you plan to use features such as Single Sign On, or to integrate your Web site with Oracle CRM On Demand.

To display an external Web page in a tab

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click Application Customisation.
3. In the Application Set-up section, click the Custom Web Tabs link.
4. On the Custom Tab List page, click New.
5. On the Custom Web Tab page, use the table below to fill in the required information and save the record.
6. (Optional) To indicate that an updated name must be translated to other languages that are activated for your company, select the Mark for Translation check box (on the Custom Web Tab Lists page) for the Web tab.

Field	Comments
Name	The name of the custom Web tab.
Type	Select the type of Web tab that you want to create: URL, HTML, Report, or Dashboard.

Field	Comments

User and System Fields	Before you create a Web applet in Oracle CRM On Demand, carefully consider how you will use parameter field variables such as %%%User Id%%%, if the field contains characters that can be escaped as character entity references.
	
	When you insert parameter field variables in HTML, characters in the field name like & are escaped as the corresponding character entity reference, (in this case &) and the browser expands the entity reference so that the referenced character is displayed. For example, you might want to create a homepage HTML Web applet with the company name: A&B Manufacturing. From the User and System Fields drop-down list, you can choose Company Name to insert the variable: %%%Company name%%% and at run time, this variable has the value A&B Manufacturing, which appears in the browser as A&B Manufacturing. However, character entity references are not expanded in JavaScript code, so in this case, put the variable in a referenceable context, retrieve it from the document DOM, then encode it as necessary. These differences are illustrated in the following example of Web Applet HTML code:
	
	`<span id=”companyname” style=”display:none” data-value=”%%%Company name%%%”></span>`
	
	`<script type=”text/javascript”>`
	
	`var var1 = ”%%%Company name%%%”;`
	
	`var var2 = document.getElementById(“companyname”).getAttribute(“data-value”);`
	
	`</script>`
	
	The value of var1 is “A&B Manufacturing” and the value of var2 is “A&B Manufacturing”. The values of var1 and var2 are different because the browser expands entity references in HTML tags and data, but not within the <script> element.
	
	Select an option from the User and System Fields drop-down list to add parameter fields to the URL or HTML field at the current position of the cursor. For example, if you choose User id from the drop-down list, %%%User id%%% is inserted into the URL or HTML field, depending on where your cursor is positioned. At run-time, this parameter is replaced with the user ID of the user who is signed in.
	
	As another example, if you choose Host Name from the list, %%%Hostname%%% is inserted at the cursor position. At run-time, this parameter is replaced with the host name of the server where Oracle CRM On Demand is running. This is useful in configurations containing a URL to Oracle CRM On Demand as it is no longer necessary to manually modify the Oracle CRM On Demand host name when migrating from one environment to another.
	
	For more information, see User and System Fields (on page 145).

Field	Comments
URL	**NOTE:** This setting is available only if you select URL from the Type menu. Enter the URL that is invoked when the user clicks the hyperlink, such as www.oracle.com. You do not have to enter the *http://* part of the URL. Make sure that the URL is a valid uniform resource identifier (URI). If it is not valid, then an error message is displayed instead of the embedded content when a user accesses the custom Web tab. **NOTE:** For more information on the standardization of URLs in Oracle CRM On Demand, see About URL Standardization (see "About URL Standardisation" on page 224). You can also include context-sensitive parameters by placing the cursor in the URL field, and then selecting the User and System Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value that is based on the current record when the user clicks the value. If you do not specify any URL, then the user is directed to a void URL when clicking the tab. Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behaviour on the browser when they click the Web tab. **NOTE:** Although it is possible to use a URL to embed a report or dashboard in a custom Web tab of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade.
HTML Head Additions	**NOTE:** This setting is available only if you select HTML from the Type menu. The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web tab. Any code that you add to the Web Tab HTML field is added to the <iframe> element. You can include references to JavaScript files that you embed in the <head> section of the HTML in this field. Referencing JavaScript files in Oracle CRM On Demand pages is not supported. Any content that you enter in this field is added to the <head> tags.

Field	Comments
Web Tab HTML	**NOTE:** This setting is available only if you select HTML from the Type menu. The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web tab. Any code that you add to the Web Tab HTML field is added to the <iframe> element. Any content that you enter in this field is added to the <body> tags.
Path	**NOTE:** This field is available only if you select Report or Dashboard from the Type menu. Click the Lookup icon (magnifying glass), then navigate to the report or dashboard you require in Shared Folders, and then click OK. The Path field is automatically populated after you select the report or dashboard.
Parameters	**NOTE:** This field is available only if you select Report or Dashboard from the Type menu. (Optional) If you want to specify filters that will be applied to the report or dashboard at run time, then specify the filters in the Parameter field. For detailed information about specifying the filters, see About Specifying Filters for Embedded Reports and Dashboards.
Description	Enter a description for the Web tab.
Height	Enter a pixel value for the Web tab.
Width	Enter a pixel value for the Web tab.
Classic Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web tab in classic themes.
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web tab in modern themes.

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation checkbox. In the other languages (or when you choose another language from the Translation Language list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. The updated name in blue text helps you to track which terms must be translated.

After you add a custom Web page to Oracle CRM On Demand, you must make it available to the user role before users can see it. For information on adding roles, see Adding Roles (on page 309).

About Picklist Value Groups

Your company can limit the values that are available in a picklist field to a subset of the values that are defined for the field, so that you can make a given picklist field on a record type available for all users in Oracle CRM On Demand while limiting the values that appear in the picklist in the field. To limit the values in picklist fields, you set up picklist value groups and then map the values in the picklist fields to the picklist value groups. In this way, the set of values that a user can select from a picklist can be controlled by a picklist value group.

You can add the Picklist Value Group field to the page layout for some record types. This field allows the user to select any picklist value group that you have created. Then, in any picklist field that is controlled by the picklist value group that is selected on the record, only the values that are mapped to the picklist value group appear in the picklist. A picklist field that is controlled by a picklist value group is controlled in the same way when the picklist field is used in a cascading picklist. For a list of the record types in which picklist value groups can be used, see Record Types That Support Picklist Value Groups and Divisions (on page 232).

For example, assume that your company has three call centres that use Oracle CRM On Demand. Depending on the location of a call centre and the products that the call centre services, some of the values in a number of picklist fields in Oracle CRM On Demand are not valid selections for users in the various call centres. In such a case, you can set up three picklist value groups; that is, one picklist value group for each call centre. You can then map a subset of the values for each of the relevant picklist fields to each of the picklist value groups. After you add the Picklist Value Group field to the page layouts for the record types, users can select the appropriate picklist value group for a call centre in the Picklist Value Group field on a record. Then, the choices in the picklist fields on the record are limited to the values that you mapped to the selected picklist value group for the call centre. Controlling the available values in picklist fields in this way can help you to reduce the risk of invalid data being recorded on the records.

About Picklist Value Groups and Divisions

If your company uses the Division record type, then you can also associate divisions with picklist value groups. For information about divisions and how to set them up, see Division Setup (on page 69). Each division can be associated with one picklist value group only. If a user is associated with one or more divisions, then when the user creates a record of a record type that supports divisions, the user's primary division is automatically assigned to the record. If the Division field and the Picklist Value Group field are both present on the Detail page layout, and if a picklist value group is associated with the user's primary division, then the Picklist Value Group field on the record is populated with the name of that picklist value group. Then, in any picklist field that is controlled by the picklist value group, only the values that are linked to the picklist value group appear in the picklist. For more information about the behaviour of the Division and Picklist Value Group fields when records are created and updated, see About Divisions and Picklist Value Groups on Records (on page 75) and About Picklist Fields, Picklist Value Groups, and Divisions.

For information about setting up picklist value groups, see the following topics:

- Considerations When Setting Up Picklist Value Groups (on page 230)
- Process of Setting Up Picklist Value Groups (on page 231)
- Creating Picklist Value Groups (on page 231)
- Mapping Picklist Values to Picklist Value Groups (on page 160)

Related Topics

See the following topics for related information:

- Division Setup (on page 69)
- About Divisions and Picklist Value Groups on Records (on page 75)

Considerations When Setting Up Picklist Value Groups

When setting up picklist value groups, consider the following:

- **Picklist fields.** A picklist value group can control one or more picklist fields on one or more record types. On the record types that support picklist value groups, you can map any editable picklist field to multiple picklist value groups.
- **Cascading picklists.** You can use picklist fields that contain values that are mapped to picklist value groups in cascading picklists. However, in a cascading picklist definition, you can specify only one set of relationships between the values in the parent picklist field and the values in the related picklist fields, regardless of whether you select a picklist value group in the Picklist Value Group list when you define the cascading picklist. For more information about how cascading picklists work with picklist value groups, see About Cascading Picklists and Picklist Value Groups (on page 194).
- **Page layouts.** You must add the Picklist Value Group field to the page layouts for the record types on which you want the picklist fields to be controlled by the picklist value groups.
- **Divisions.** You can associate a picklist value group with one or more divisions, but each division can be associated with only one picklist value group. You can see a list of the divisions that are associated with a picklist value group in the read-only Divisions section of the Picklist Value Group Detail page.
- **Search.** You cannot search for picklist value group records in the Action bar or in an advanced search.
- **Picklist Value Group field.** For the record types that support picklist value groups, you can do the following:
  - Specify the Picklist Value Group field as read-only if you do not want users to be able to change or clear the value in the field.
  - Use the Picklist Value Group field in Expression Builder.
  - Use the Picklist Value Group field in workflow rules.
  - Include the Picklist Value Group field in the search layouts.

NOTE: You cannot specify a default value for the Picklist Value Group field through the Fields Setup pages.

Related Topics

See the following topics for related information:

- Process of Setting Up Picklist Value Groups (on page 231)
- Creating Picklist Value Groups (on page 231)
- Mapping Picklist Values to Picklist Value Groups (on page 160)

Process of Setting Up Picklist Value Groups

Before you begin. Review the information in Considerations When Setting Up Picklist Value Groups (on page 230).

To set up picklist value groups for your company, perform the following tasks:

1. Determine the following:
   - The picklist value groups that you want to set up.
   - The picklist fields that you want your picklist value groups to control.
   - For each picklist field that you want your picklist value groups to control, the values that you want to map to each picklist value group.
2. Create your picklist value groups.

   For more information, see Creating Picklist Value Groups (on page 231).
3. Map the values in the picklist fields to your picklist value groups.

   For more information, see Mapping Picklist Values to Picklist Value Groups (on page 160).
4. Add the Picklist Value Group field to each of the page layouts for the record types on which the picklist fields will be controlled by the picklist value groups.

   For more information, see Customising Static Page Layouts (on page 165) and Specifying Dynamic Page Layouts (on page 213).

   NOTE: For the picklist value groups to control the values that are available in the picklist fields on a record, the Picklist Value Group field must be present on the Detail page layout for the record type.

Creating Picklist Value Groups

To create a picklist value group, complete the steps in the following procedure. This task is a step in Process of Setting Up Picklist Value Groups (on page 231).

Before you begin. To perform the procedures described in this topic, you must have the Customise Application privilege in your user role.

To create a picklist value group

1. Click the Admin global link.
2. In the Application Customisation section, click Application Customisation.
3. In the Application Setup section, click Manage Picklist Value Groups.
4. In the Picklists Value Group List page, click New.
5. Enter a name and a description for the picklist value group, and then save your changes.

NOTE: After you create a picklist value group, you can map picklist field values to the picklist value group. For more information, see Mapping Picklist Values to Picklist Value Groups (on page 160). You can then see a list of the picklist fields that are mapped to the picklist value group in the Objects List section of the Picklist Value Group Detail page. For each picklist field that is mapped to the picklist value group, the name of the record type on which the picklist field appears and the name of the picklist field are shown.

If your company uses the Division record type, then the Divisions section of the Picklist Value Group Detail page shows the names of the divisions with which the picklist value group is associated. For information about associating picklist value groups with divisions, see Associating Picklist Value Groups with Divisions (on page 72).

Record Types That Support Picklist Value Groups and Divisions

The Division field and the Picklist Value Group field are available to be added to page layouts for the following record types, so that a division and picklist value group can be associated with a record of any of these record types:

- Account
- Activity
- Blocked Product
- Broker Profile
- Business Plan
- Campaign
- Claim
- Contact
- Custom Objects
- Damage
- Deal Registration
- Deal Registration Product Revenue
- Event
- Financial Account
- Financial Account Holder
- Financial Account Holding
- Financial Plan
- Financial Product
- Financial Transaction
- Fund

- HCP Contact Allocation
- Household
- Insurance Property
- Lead
- MDF Request
- Message Response
- Messaging Plan
- Messaging Plan Item
- Messaging Plan Item Relations
- Objective
- Opportunity
- Order
- Partner
- Plan Account
- Plan Contact
- Plan Opportunity
- Policy
- Policy Holder
- Portfolio
- Product
- Product Indication
- Sample Disclaimer
- Sample Inventory
- Sample Lot
- Sample Request
- Sample Request Item
- Sample Transaction
- Service Request
- Solution
- Vehicle

Creating Global Web Applets

A global Web applet is a custom Web applet that can appear on My Homepage or in the Action bar. You can embed external Web content in custom global Web applets. You can also embed reports and dashboards in custom global Web applets.

When you create a global Web applet, you must add it to the layout for My Homepage or the Action bar.

Before you begin. To perform this procedure, your role must include the Customise Application and Manage Custom Web Applets privileges. If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then you can create applets only if the language that is selected in the Translation Language field is the default language for the company.

To create a new global web applet

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click Application Customisation.
3. In the Application Set-up section, select Global Web Applets.
4. In the My Applet List, click New.
5. On the My Web Applet page, complete the following fields:

Field	Comments
Name	Enter a name.
Mark for Translation	This check box is available only if the Enable Language Translation Support for Web Applets check box is selected on the company profile. When you first create an applet, the Mark for Translation check box is selected and read-only. The Mark for Translation check box is effective only when you update an existing applet. In addition, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Language field in the list of applets before you edit the applet. If you change the name of an existing custom Web applet in the default language for the company, then use the Mark for Translation check box as follows: ■ If you want the translated versions of the name to be replaced by the updated name, then select the Mark for Translation check box. ■ If you want the translated versions of the name to remain unchanged, then do not select the Mark for Translations check box. For more information about translating custom Web

Field	Comments
	applet names, see Translating Web Applet and Custom Report Names (on page 191).
Location	Select Homepage or Action bar, depending on whether the external content, report, or dashboard is to appear on a homepage or on the Action bar.
Columns	**NOTE:** This field is applicable only when the Location value is Homepage. Specify the width of the applet by selecting single or double from the Columns menu.
Always Run	This check box determines whether a global Web applet is executed if the applet is minimised. This check box is available only for global Web applets for which you select Action bar as the location. **Note:** Global Web applets that you add to the global header always execute, regardless of whether the Always Run check box is selected or not. The global header is visible only with modern themes.

Next, complete the fields according to the type of applet you require, as described in the following topics:

- Creating Dashboard Web Applets (on page 188)
- Creating HTML Web Applets (on page 183)
- Creating Report Web Applets (on page 187)
- Creating RSS Feed Web Applets (on page 179)
- Creating URL Web Applets (on page 184)

Related Topics

- Example of Setting Up an RSS Feed Web Applet (on page 189)
- Translating Web Applet and Custom Report Names (on page 191)

Important Considerations for Customers Using Customised Code in Oracle CRM On Demand

The following important considerations apply to the use of customised code in Oracle CRM On Demand:

- Customers using customised code, such as JavaScript code, in Oracle CRM On Demand do so at their own risk. Oracle does *not* provide support or troubleshoot for any problems that arise as a result of the use of

customised code in Oracle CRM On Demand, including for any modifications that are made to Oracle CRM On Demand through the customised code.

- Customers using customised code, such as JavaScript code, in Oracle CRM On Demand are *strongly* encouraged to test their code after any upgrade to a new release of Oracle CRM On Demand. It is the customer's responsibility to update their customised code after upgrading to a new release. In addition, new releases of Oracle CRM On Demand may contain updated infrastructure components and it is the customer's responsibility to modify any customised code, as necessary, to adapt to any changes in infrastructure components.
- Customers can invoke Oracle CRM On Demand Web Services API methods through customised code. However, Oracle only provides guidance on the use of Oracle CRM On Demand Web Services APIs, Oracle CRM On Demand Web Services session management, and best practices for using Oracle CRM On Demand Web Services. For more information regarding Oracle CRM On Demand Web Services, see Oracle Web Services On Demand Guide.
- Customers can invoke Oracle CRM On Demand public JavaScript API methods through code in custom HTML head additions. For more information, see Managing Custom HTML Head Additions (on page 239) and Oracle CRM On Demand JavaScript API Developer's Guide.

Related Topic

See the following topic for related information:

- About Disabling Customised Code for Users (on page 176)

Uploading Client Side Extensions

Client side extensions are files that you can upload to and host on Oracle CRM On Demand instead of hosting them on other servers. When you upload a client side extension, Oracle CRM On Demand generates a unique URL that you use to reference the extension. One client side extension can call a second client side extension by using the unique URL of the second client side extension. You can use a URL to deploy a client side extension in custom Web tabs, custom Web applets, global Web applets, and in custom HTML head additions.

You can upload HTML, JPG, GIF, SWF, JavaScript, and CSS files from the Oracle CRM On Demand Client Side Extension List page to create a client side extension. The maximum file size is 20 megabytes (MB). However, smaller file sizes provide better performance when the browser downloads these files from Oracle CRM On Demand.

NOTE: Oracle CRM On Demand Customer Care does not have access to any component of client side extensions. These components include the uploaded files or the content contained within those files, images, or locations from which the client side extensions are referenced, including custom Web tabs, custom Web applets, global Web applets, and custom HTML head additions. Therefore, you are responsible for maintaining and supporting these extensions.

Before you begin. To perform this procedure, your role must include the Upload Client Side Extensions and Manage Custom HTML Head Tag privilege. For more information on adding privileges, see About Privileges in Roles (on page 307).

To upload a client side extension

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

2 In the Application Customisation section, click Application Customisation.

3 In the Application Set-up section, click Client Side Extensions.

The Client Side Extensions List page displays previously uploaded client side extensions. You can also delete previously uploaded client side extensions on this page.

NOTE: If you delete a client side extension that has been set up for a custom Web tab, applet, global Web applet, or custom HTML head addition, then those applets will no longer function correctly because the client side extension has been removed. Oracle CRM On Demand does not indicate if a particular client side extension is in use.

4 Click New.

5 Click the paperclip icon to find the content that you want to upload as a client side extension.

This field is required.

6 Enter the following details:

- **MIME Type.** This indicates the Internet media type. This type allows the browser to display media types properly. Enter the full details of the MIME types. Enter, for example, one of the following depending on your file type:
  - text/html
  - image/jpeg
  - image/gif
  - application/x-shockwave-flash
  - text/css
- **File: Size (In Bytes).** The size of the uploaded file. Oracle CRM On Demand populates this field.
- **File: Extensions.** The file extension of the uploaded file. Oracle CRM On Demand populates this field.
- **Name.** The name of the client side extension. This field is required.
- **URL Name.** This value is used to provide a meaningful name for the URL that points to the client side extension. The following characters are accepted in the URL name: A-Z, a-z, 0-9, underscore (_), and period (.). Double periods (..) are not permitted, and a period (.) must not be the last character in the string. Examples of URL names are: Logo_Image and Map376. It is recommended that you keep this field as short as possible. This field changes only when a user edits it. Therefore, if you replace the uploaded file, or if you change the client side extension name, then the URL Name field value is unchanged. As a result, you can update, maintain and deploy multiple versions of the client side extension without having to reconfigure the custom Web tabs, custom Web applets, global Web tabs, or custom HTML head additions. Editing this field changes the Relative URL and Full URL fields. This field is required.
- **Relative URL.** Oracle CRM On Demand completes this field. This value is the relative URL that navigates to the client side extension from within Oracle CRM On Demand. If this field value changes, and the client side extension is deployed, then you must update the custom Web tabs, custom Web

applets, global Web tabs, or custom HTML head additions that reference this client side extension to use the newly generated URL. This field value changes only if the URL Name field is updated.

- **Full URL.** Oracle CRM On Demand completes this field. This value is the full URL that points to the URL in the Oracle CRM On Demand application. If this field value changes, and the client side extension is deployed, then you must update custom Web tabs, custom Web applets, global Web tabs, or custom HTML head additions that reference this client side extension to use the newly generated URL. This field value changes only if the URL Name field is updated.

7 Click Save.

NOTE: You can upload a client side extension, but it is not active until you configure it in a custom Web tab, custom Web applet, global Web tab, or custom HTML head addition .

After a client side extension is uploaded, Oracle CRM On Demand generates the Relative URL and Full URL fields. You use these values to associate a custom Web tab, custom Web applet, global Web tab, or custom HTML head addition with the client side extension. You configure these locations in the same way that you configure any extension hosted on your servers.

For information about adding custom HTML head additions, see Managing Custom HTML Head Additions (on page 239).

To edit an existing client side extension

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

2 In the Application Customisation section, click Application Customisation.

3 In the Application Set-up section, click Client Side Extensions.

4 In the Client Side Extensions List page, find the client side extension that you want to edit.

5 Perform one of the following:

- Click the Name field. This step opens the Client Side detail page where you can edit the client side extension.
- Click Edit.

6 Click Save.

7 If you have replaced the file for the client side extension, do the following:

a Log out of Oracle CRM On Demand.

b Clear your browser cache.

c Log in again to download the new client side extension so that the client side extension is downloaded to the page deploying the client side extension. If you do not log out of Oracle CRM On Demand and log in again, the new client side extension will be downloaded 30 days after you have performed the first download.

Guidelines for Editing Client Side Extensions

Consider the following guidelines:

- **Keep the number of references to client side extensions on a page to a minimum to reduce the negative impact on performance.**
- **Keep the size of your client side extensions as small as possible.** For example, avoid using large image or SWF files. The smaller the file that you download as part of the client side extension, the faster the page loads compared to larger files.
- **Keep all client side extensions in as few files as possible to reduce the negative impact on performance.**
- **Allow your browser to cache your client side extensions.** If you allow your browser to cache the client side extensions, then the content does not have to be downloaded from the Oracle CRM On Demand servers each time that a user loads the page. If the client side extension changes, then you must clear your cache so that Oracle CRM On Demand loads the page containing the extension. By default, client side extensions are cached for 30 days.
- **Keep client side extensions and assets to a minimum to improve the Action bar performance.** When configuring a client side extension contained in an applet on the Action bar, the Action bar loads every time the page refreshes.
- **Follow all Web services guidelines when using client side extensions to call Web services.** For more information, see Oracle Web Services On Demand Guide.

Managing Custom HTML Head Additions

You can add custom <script> elements to the HTML <head> element of your pages. For example, within the <script> elements you can add JavaScript code that contains functions to create custom buttons on your pages. Your customised code can also reference JavaScript files that were uploaded through client side extensions or external JavaScript files, so that the functions in those files are available in your customised code. HTML head additions apply to all pages in Oracle CRM On Demand.

On the Edit Custom HTML Head Tag page, a Preview button enables you to validate any changes you have made.

You can disable the custom HTML head additions by setting the disableCustomJS=Y parameter in the URL for the page. If you navigate away from the page by clicking another link, then the URL parameter is not retained. You must specify the URL parameter each time that you require it. For more information about writing customised JavaScript code and the public application programming interfaces (API) that are available, see Oracle CRM On Demand JavaScript API Developer's Guide.

Before you begin. To perform this procedure, your role must include the Upload Client Side Extensions and Manage Custom HTML Head Tag privilege. For more information on adding privileges, see About Privileges in Roles (on page 307).

To add a custom HTML head addition

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

2. In the Application Customisation section, click Application Customisation.
3. In the Application Set-up section, click Custom HTML Head Tag.
4. In the Custom HTML Head Tags Detail page, click Edit.
5. In the HTML Head Additions text box, enter the <script> elements that you require.

   This field has a limit of 50,000 characters.
6. Click Preview to validate any changes you have made.
7. Click Save.

Guidelines for Referencing Client Side Extensions

Consider the following guidelines:

- **Keep the number of references to client side extensions on a page to a minimum to reduce the negative impact on performance.**
- **Keep the size of your client side extensions as small as possible.** The smaller the file that you download as part of the client side extension, the faster the page loads compared to larger files.
- **Keep all client side extensions in as few files as possible to reduce the negative impact on performance.**
- **Allow your browser to cache your client side extensions.** If you allow your browser to cache the client side extensions, then the content does not have to be downloaded from the Oracle CRM On Demand servers each time that a user loads the page. If the client side extension changes, then you must clear your cache so that Oracle CRM On Demand loads the page containing the extension. By default, client side extensions are cached for 30 days.

Related Information

See the following topic for related information:

- About Disabling Customised Code for Users (on page 176)

Creating and Managing Action Bar and Global Header Layouts

The Action bar can contain a number of sections, such as Message Centre, Search, Communication Tools, Enhanced Keyword Search, and Recently Viewed. You can create custom layouts for the Action bar and the global header, customise the global header section, and assign these layouts to specific roles in Oracle CRM On Demand. Configuration changes to both the action bar and the global header are visible only to the roles using the modern theme. However, for roles using a classic theme, only configuration changes to the action bar layout are visible.

Making the Action Bar Unavailable to Users

By default, the Action bar appears on the left side of all Oracle CRM On Demand pages. Users can hide or show the Action bar as required. For more information, see About Showing or Hiding the Action Bar.

If you want the Action bar to be unavailable to a certain user role, then set up an action bar layout that is empty (that is, no sections are displayed or available in the layout), and assign that layout to the user role. The Action bar is then permanently hidden from the users who have that user role.

The following procedure describes how to add an action bar layout.

To add a new action bar layout

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click Application Customisation.
3. In the Application Setup section, click Action Bar and Global Header Layout.
4. In the Action Bar Layout and Global Header Layouts page, click New Layout.
5. In the Layout Name field, enter a name for the new action bar layout.
6. In the Description field, enter a name for the new action bar layout, and click Next.
7. Choose the sections to display in the action bar layout by moving fields from the Action Bar Available Sections to the Action Bar Displayed Sections using the left and right arrows. Use the up and down arrows to change the order of the selected fields.
8. Choose the sections to display in the global header by moving sections from the Action Bar Displayed Sections to the Global Header Available Sections using the left and right arrows.
9. Click Finish.
10. (Optional) Click the Edit button to edit any of the values you entered in steps 5 to 9.

Alternatively you can copy the existing default action bar layout provided in Oracle CRM On Demand and change the description and configuration to your requirements.

To copy an action bar layout

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click Application Customisation.
3. In the Application Setup section, click Action Bar and Global Header Layout.
4. Click the Copy link to the left of Action Bar and Global Header Standard Layout.
5. In the Layout Name field, enter a name for the new action bar layout.

6 In the Description field, enter a name for the new action bar layout, and click Next.

7 Choose the sections to display in the action bar layout by moving fields from the Action Bar Available Sections to the Action Bar Displayed Sections using the left and right arrows. Use the up and down arrows to change the order of the selected fields.

8 Choose the sections to display in the global header by moving sections from the Action Bar Displayed Sections to the Global Header Available Sections using the left and right arrows.

9 Click Finish.

NOTE: To copy other action bar layouts, click the down arrow to the left of the action bar layout name to display the copy function.

To edit the global header

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

2 In the Application Customisation section, click Application Customisation.

3 In the Application Setup section, click Action Bar and Global Header Layout.

4 In the Action Bar and Global Header Layout page, click the down arrow beside the required layout.

5 From the menu, select Edit Global Header.

The Global Header Icon Edit page lists any available global header sections in ascending order. If you enter the same order value for two or more global header sections, then those global header sections are displayed in the order in which they were created.

6 Perform one of the following:

- Click New to configure the global header sections.
- Click Edit beside the global header section that you want to edit.

7 Click the magnifying glass icon to change the icon for your section.

8 From the Applet menu, select an available section.

9 (Optional) In the Description field, enter a description.

10 In the Applet Width field, enter the width of the section.

The maximum width of the global header section is 700 pixels.

11 In the Order field, enter the order value in which you want your section to display on the global header.

Global header sections are displayed from left to right according to the ascending order value.

12 Click Save.

Note: Global Web applets that are displayed in the global header always run, regardless of whether the Always Run check box in the My Web Applet page is selected or not. Be aware that certain Web applet content can impact performance, for example, if your Web applet references an external Web site. For more information about the Always Run check box, see Creating Global Web Applets (on page 234).

Customising My Homepage for Your Company

Depending on their needs, employees at your company might want to see different information on their My Homepage page. You can customise the layout of My Homepage by replacing the default content with content that is more relevant to the roles of the employees. For example, you might configure the Homepage for a customer service representative to show new service requests instead of the Recently Created Leads section that is standard on that page, and a custom service-request report instead of the standard sales pipeline quality report.

After you have customised My Homepage, you must assign the Homepage layout to a user role. All users with that role see the customised My Homepage that you set up.

Before you begin. Because you must select a role that this customisation applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customise Application privilege and the Customise Application - Manage Homepage Customisation privilege.

To customise My Homepage for your company

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Application Set-up section, click the My Homepage Layout link.
4. In the Homepage Layout list, perform one of the following:
   - Click the New Layout button to create a new layout.
   - Click Edit or Copy to modify an existing custom layout.

   The Homepage Layout Wizard appears to guide you through the process.
5. In Step 1 Layout Name, enter a name for the layout, and a description if required.
6. In Step 2 Homepage Layout:
   - Move sections from the All Sections list to the Available Sections list.

     The Available Sections list includes the sections that can be added to a Homepage; this includes any custom reports that you have enabled for inclusion in Homepages. If you do not want a user to add a section to a Homepage, leave the section in the All Sections list.
   - Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

Leave sections that are double width in the Left Side list; they will automatically stretch across the Homepage when it is displayed

7 Click Finish.

NOTE: After you add a custom homepage to the application, you need to make it available to the user role before users can see it. For instructions, see Adding Roles (on page 309).

Enabling Custom Reports in My Homepage

You can use the My Homepage Custom Report feature to add multiple reports, including both prebuilt and custom reports, to My Homepage. These custom reports are then displayed in the All Sections list in Step 2 in the Homepage Layout Wizard, and you can move them to the list of Available Sections or to one of the lists of sections that are displayed by default in My Homepage. For more information about customising My Homepage, see Customising My Homepage for Your Company (on page 243).

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 142).

Before you begin:

The report that you want to enable in My Homepage must be stored under Shared Folders, in a folder to which you have access.

- Your role must include the Customise Application privilege and the Customise Application - Manage Homepage Customisation privilege.
- To select a report from the Migrated Company Wide Shared Folder, your user role must include the Access Migrated Company Wide Shared Folder privilege.
- If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then you can create custom reports only if the language that is selected in the Translation Language field is the default language for the company.

To create a My Homepage custom report

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Application Set-up section, click the My Homepage Custom Reports link.

4 In the My Homepage Custom Reports list, click New Homepage Report.

5 On the Homepage Custom Report Detail page, complete the following fields.

Field	Comments
Name	Enter the name of the custom report.

Field	Comments
Mark for Translation	This check box is available only if the Enable Language Translation Support for Web Applets check box is selected on the company profile. When you create a custom report, the Mark for Translation check box is selected and read-only. Also, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Field in the list of custom reports before you update an existing custom report. If you change the name of an existing custom report in the default language for the company, then use the Mark for Translation check box as follows: ■ If you want the translated versions of the name to be replaced by the updated name, then select the Mark for Translation check box. ■ If you want the translated versions of the name to remain unchanged, then do not select the Mark for Translations check box. For more information about translating custom report names, see Translating Web Applet and Custom Report Names (on page 191).
Height	Select Single or Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.
Width	Select Single or Double. If you want the report to span the entire Homepage from left to right, set the width to Double. **NOTE:** Reports that have an HTML RowSpan attribute value of more than 2 sometimes span beyond the specified size.
Execute Report Immediately	If you select this check box, the report will run automatically, and users will not have to click a link to update the report.
Catalogue	Select the catalogue for the report that you want to embed.

1 Click the Lookup icon (magnifying glass), and then navigate to the report you require in Shared Folders.

The Report Path field is automatically populated after you select the report.

2 In the Description field, enter a description for the homepage custom report.

3 Click Save.

Renaming Record Types

To use terminology that is familiar to your users, you might want to rename record types. The default record type names in the application might not be the same as those used by your company for certain types of records. If this is the case, you can change the name to meet your specific requirements.

When you change the name of a record type, the new name appears in most places in the application, such as:

- Tabs and buttons
- Drop-down lists
- Predefined filtered lists, such as the All Accounts list on the Account Homepage
- Title bars on pages, such as on record detail and list pages
- The Create section in the Action bar
- Page section names
- Record assignment email notification
- Customised page section names

For example, you can change the Account display name to Company. The Account tab becomes Company and other section titles change accordingly.

However, there are several places in which the new name does not appear. If you change names, inform your users that the new names do not appear in the following:

- Custom filtered list names
- Custom field names
- Reports and Analyses
- Oracle Outlook Email Integration On Demand
- Help pages

NOTE: All display names have a maximum length of 50 characters.

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

To rename a record type

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Application Set-up section, click the Customise Record Types link.

4 On the Customise Record Types page, type the new names in the appropriate row. You must supply all three variations for the application to use in the appropriate areas of the interface: Display Name/Singular, Display Name/Plural and Display Name/Short.

NOTE: The Display Name/Short appears in the tabs, so it should not exceed 15 characters. You cannot rename an object to the name of any of the objects available in the Customise Record Types page. You cannot rename an object, for example, Task or Appointment because objects are not listed in the Customise Record Types page.

5 (Optional) To indicate that an updated name needs to be translated into other languages activated for your company, select the Mark for Translation checkbox.

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation checkbox. In the other languages (or when you choose another language from the Translation Language drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previously translated display names remain, unaffected by the change you made here.

6 To manually enter the translated equivalent of the new name:

a From the Translation Language drop-down list, select the language for which you want to enter a translation.

b Enter the translated equivalent in the appropriate Display Name field and click Save.

c Click the link to return to the page that you just updated and select the language again, if necessary.

The translated name appears in black text in the Display Name column.

Enabling Images on Detail Pages

You can add images to the detail page of a record type. For example, you might want to add a photo to the Contact Detail page, a company logo to the Account Detail page, or the picture of a product to the Product Detail page. You can enable images on the detail pages only for the following record types:

- Account
- Contact
- Product

To enable an image on a detail page

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Application Set-up section, click the Customise Record Types link.

4 Select the Display Image check box for the Account, Contact, or Product record types.

5 Click Save.

Uploading and Managing Custom Icon Sets

You can upload and manage a set of custom icons to associate with a record type. Each custom icon set contains three icons: an icon for the record type tab, for the Action bar, and for the related information areas of Oracle CRM On Demand.

Custom icon sets improve the look-and-feel of Oracle CRM On Demand, allowing users to view icons that are more relevant for record types. You can edit an existing custom icon set and then modify it to your requirements.

NOTE: The maximum number of custom icon sets you can create is 100.

Before you begin. To perform this procedure, your role must include the Manage Custom Icons privilege. You can only associate custom icon sets with record types when using modern themes.

To create and publish a new icon set

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Application Setup section, click the Icon Management link.

4 On the Icon Management page, click the Object Icons link.

5 In the Icon Sets page, click Add to create a new icon set.

6 In the Icon Set Edit page, enter the name of the new icon set in the Icon Set Name field, and click Save.

The maximum number of characters you can use in the Icon Set Name field is 50.

7 In the Icons tab, click New.

8 In the Icon Edit page, select one of the following from the Icon Type picklist to locate the images that you want to use in your icon set:

- **Main Icon.** The custom icon that is used in the record type tab. It is recommended that the selected image for this icon measures 50 pixels in width by 50 pixels in height.
- **Mini Icon.** The custom icon that is used in the Action bar. It is recommended that the selected image for this icon measures 25 pixels in width by 25 pixels in height.
- **Related Information Icon.** The custom icon that is used in the related information area. It is recommended that the selected image for this icon measures 45 pixels in width by 45 pixels in height. If you want this image to fit in with the colour scheme used in Oracle CRM On Demand, then this image must have a transparent background.

NOTE: You can upload images with the following extensions: JPEG, JPG, PNG, or GIF. The file size limit is 100 KB.

9 Click Browse to locate the image you require, then click Save & New Icon.

10 Repeat steps 8-9 for each icon type in the custom icon set.

11 Click Publish.

For information on associating your custom icon sets to a record type, see Changing the Icon for a Record Type (on page 252).

Uploading and Managing Custom Global Header Icons

You can upload custom icons to associate with your global header layout. This allows you to use meaningful icons for items in your global header layout.

Before you begin. To perform this procedure, your role must include the Manage Custom Icons privilege.

To create a new custom icon set

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Application Setup section, click the Icon Management link.

4 On the Icon Management page, click the Global Header Icons link.

5 In the Global Header Icons page, click Add to create a new custom icon.

6 In the Global Header Icon Edit page, click Browse to locate the image that you want to use.

NOTE: You can upload images with the following extensions: JPEG, JPG, PNG, or GIF. The file size limit is 100 KB. The maximum number of images you can upload is 50. If you want this image to fit in with the colour scheme used in Oracle CRM On Demand, then this image must be white, it also must be approximately 45 pixels high and 45 pixels wide and have a transparent background.

7 Click Save & New Global Header Icon.

8 Repeat steps 6-7 for each custom icon you want to upload to the global header icon set.

9 (Optional) To delete a custom icon do the following:

a Click the down arrow beside the required custom icon.

b From the menu, select Delete.

For information on global header layouts, see Creating and Managing Action Bar and Global Header Layouts. (see "Creating and Managing Action Bar and Global Header Layouts" on page 240)

(see "Changing the Icon for a Record Type" on page 252)

Adding Record Types

You can add custom record types for your company. For example, you might want to display an Order tab to be used by your employees. To add a new record type, you rename and configure one of the custom object record types in Oracle CRM On Demand.

The privileges that allow your company to use the Custom Object 01 through Custom Object 10 record types and to give users access to those record types are enabled by default for the Administrator role in Oracle CRM On Demand. However, if your company needs to use more than 10 custom object record types, then you must contact Oracle CRM On Demand Customer Care to ask to have the additional custom object record types made available to your company.

In general, new record types work in the same way as the record types that are provided by default. A set of fields is available for each record type, including a Name field that can be used for filtering and sorting lists.

NOTE: For each of the Custom Object 01, 02, and 03 record types, eight fields are available for filtering and sorting lists of records of these record types. For all other custom object record types, only the Name field can be used for filtering and sorting lists of records of that record type.

You can set up custom fields, page layouts, search layouts, and so on for the new record types. However, you cannot use the new record types in the following areas:

- Assignment Manager
- Forecasting
- Default Group Assignment (they cannot be shared through groups)

In addition, new record types have these restrictions:

- New record types cannot contain the country-specific address groups
- By default, only the Name field is required in new record types
- No duplicate checking is performed on the new record type

For information about using Web services with new record types, see Downloading WSDL and Schema Files (on page 790).

Before you begin. To perform this procedure, your role must include both the Customise Application privilege and the appropriate Customise Application privilege for the custom object you are using for your new record type. There are individual privileges for the Custom Object 01, 02, and 03 record types, for example, the Customise Application - Manage Custom Object 01 privilege. For other custom object record types, each privilege applies to a group of custom objects, for example, the Customise Application - Manage Custom Objects 04-10 privilege.

To add a record type

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Application Set-up section, click the Customise Record Types link.

4 In the row for the custom object record type that you are using, fill in the information, for example, enter Order.

For more information, see Renaming Record Types (on page 246). After you rename the record type, it appears under its new name in the Record Type Set-up sections on the Application Customisation page, replacing the link for the custom object record type.

5 Click Save.

6 In the Record Type Set-up section on the Application Customisation page, click the link for the new record type.

7 In the Field Management section, click the Field Set-up link.

8 On the Field Set-up page, you can perform the following:

- (Recommended) Click Manage Field Labels and rename the fields to meet your requirements.

  It is recommended that you rename the Name field. Throughout the application, each record type has a field called Name, which is preceded by the record type (Account Name, Opportunity Name and so on). Therefore, if you are adding a record type named Order, you might relabel the Name field to Order Name. If your company uses Targeted Search, then the Name field appears by default as a search field in the Search section of the Action bar.

  NOTE: For the Custom Objects 01 through 03 record types only, the Quick Search 1 and Quick Search 2 fields also appear as search fields by default in the Search section of the Action bar, so you might want to rename the Quick Search 1 and Quick Search 2 fields. For example, if you are adding a record type named Order, then you might want to rename the Quick Search 1 field as Order Number. Then, when an employee selects Order from the list of record types in the Search section, Order Number appears as one of the search fields.

- Click New Fields and add custom fields.

  The same restrictions exist for these record types as for custom fields for the default record types.

For more information about editing fields and creating custom fields, see Creating and Editing Fields (on page 125).

9 Set up the page layouts for the Edit and Detail pages for the new record type.

You can add fields to the record Edit pages, group the fields into separate sections and rename these sections.

To create relationships with other record types, add the fields (Account, Contact, Opportunity and so on) to the page layouts. This creates a Lookup icon next to the field, where users can link existing records to this new record type.

You can add related information sections to the Detail pages.

When you add Team as a related information section, users can share this record with team members on a record-by-record basis.

NOTE: The Team related information section is supported for all custom object record types.

For instructions, see Customising Static Page Layouts (on page 165).

10 (Optional) Set up search layouts for the new record type. For more information, see Managing Search Layouts (on page 195).

11 (Optional) Set up custom Homepage layouts for the new record type. For more information, see Creating Record Homepage Layouts (on page 205).

12 (Optional) Add the new record type as a field or as a related information section in the page layouts for other record types.

NOTE: After you finish setting up the new record type, you must update the relevant access profiles to give the users the appropriate access levels for the new record type. You must also update the relevant user roles to make the tab for the record type available to the roles, and to assign your customised page layouts, Homepage layouts, and search layouts for the record type to the roles. For information about updating access profiles, see Process of Setting Up Access Profiles (on page 332). For information about updating roles, see Adding Roles (on page 309).

Related Topics

See the following topic for related information:

- About Many-to-Many Relationships for Custom Objects (on page 266)

Changing the Icon for a Record Type

You can change the icon that is associated with a record type, and which is displayed on tabs and in the Create section in the action bar.

Before you begin. To perform this procedure, your role must include the Customise Application privilege.

To change the icon for a record type

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Application Set-up section, click the Customise Record Types link.

4 On the Customise Record Types page, do one or both of the following:

a Click the Lookup icon in the Classic Icon field for the record type and select an icon from the window.

b Click the Lookup icon in the Modern Icon field for the record type and select an icon from the window.

If you have created any custom icon sets, they are displayed under the Custom Icons heading. For more information about custom icon sets, see Uploading and Managing Custom Icon Sets (on page 248).

5 Click Save.

Customising REST Integration Tags

Each record type has two REST integration tags that can be used by Oracle CRM On Demand REST API to access the record type (resource). One of the REST integration tags is the default tag for the record type. The default tag is language-independent and you cannot change it. You can customise the other REST integration tag. For example, if your company renames a record type or uses a custom record type, then you might want to customise the REST integration tag for that record type, so that the REST integration tag reflects the name of the record type.

An Oracle CRM On Demand REST API URL can access a resource using either of the REST integration tags, as shown in the following example URLs:

`http://server/OnDemand/user/Rest/latest/`*`default_integration_tag`*

`http://server/OnDemand/user/Rest/latest/`*`custom_integration_tag`*

In these examples, default_integration_tag is a placeholder for the default integration tag, and custom_integration_tag is a placeholder for the customised REST integration tag.

The following procedure describes how to customise the REST API integration tags that you use in REST API URLs.

To customise REST integration tags

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

2 In the Application Customisation section, click Application Customisation.

3 Click the Customise REST Integration Tags link.

4 In the REST Integration Tags list, click the Edit link for the record type.

5 In the REST Integration Tag field, enter the new name and click Save.

Creating New Themes

The theme determines the appearance of Oracle CRM On Demand. Several predefined themes are available when Oracle CRM On Demand is first set up for a new company, the default theme is *Oracle.* You can specify which roles can create and manage themes in the Role Management Wizard. For more information on adding roles, see Adding Roles (on page 309). For more information on specifying themes at the company level, see Setting Up Your Company Profile and Global Defaults (on page 19).

You can choose a theme at the company, role, or user level. The theme specified at the user level takes precedence, followed by the theme specified at the role level. The company default theme is applied if neither the user level nor the role level specifies a theme.

If you are upgrading themes from Oracle CRM On Demand Release 16 to a later release, note the following:

- **For new companies.** *Oracle* is the default theme at the company level. No theme is selected at the role or user level. Company administrators can create new themes and set them as the default. They can also disable existing themes so that they cannot be selected by users.
- **For existing companies.** The names of any old themes will be replaced by the following strings: *Oracle - Deprecated*, *Contemporary - Deprecated*, or *Classic - Deprecated*. It is recommended that you change these old themes, choose one of the new themes, and remove the old themes from the user profiles.
- **For existing companies that use logos and links.** An upgrade does not affect a deprecated theme, which is still selected. However, it is recommended that you do not use old (deprecated) themes, but create new themes, and set new themes as the default at the company or role level.

Before you begin. To create and edit themes, your user role must include the Manage Themes privilege.

The following task describes how to create your own theme in Oracle CRM On Demand.

To create a new theme in Oracle CRM On Demand

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Application Set-up section, click the Themes link.
4. In the Themes page, click New.
5. Enter information for the following fields:
   - **Theme Name.** Enter a name for your new theme.
   - **Show Default Help Link.** Select this check box if you want your new theme to display the default Help link.
   - **Show Default Training and Support Link.** Select this check box if you want your new theme to display the default Training and Support link.
   - **Show Default Deleted Items Link**. Select this check box if you want your new theme to display the default Deleted Items global link.
   - **Support Head-Up Display Settings**. Select this check box if you want your new theme to support the head-up display. You can remove the head-up display completely by deselecting this check box on a user's theme.

     NOTE: In addition to your theme supporting the head-up display functionality, users need to enable the Head-Up Display option in the Personal Detail page. If the Head-up Display field in the user's personal profile is blank, then the setting for the company is used. For more information on the head-up display , see Oracle CRM On Demand Page-by-Page Overview and Updating Your Personal Details.
   - **Description.** Enter a description for your new theme.
   - **Theme Style.** This field is required. The default value for this menu is Classic.
   - **Tab Style.** Select Classic or Modern. This menu is available only if you select Classic from the Theme Style menu. The default value for this menu is Stacked.

- **Font Size.** Select Regular or Large. If you select Classic from the Theme Style menu, then the default value for this menu is Regular. If you select Modern from the Theme Style menu, then the default value for this menu is Large.

6 Click Save.

Oracle CRM On Demand opens the Theme Detail page with a dynamic preview of the new theme, which is to the right of the screen. The preview shows the Home, Detail, and List pages, with the new theme applied. In the modern theme, you can preview the Calendar page also.

7 Enter information for the fields listed in the following table.

SHOW ME

NOTE: To enter new colour codes, you can either enter a hexadecimal value for each colour, or move the mouse over the default colour value to display the colour palette icon. Click the colour palette icon to select a colour for this field.

General Information	Description
Show Default Help Link.	Select this check box if you want your new theme to display the default Help link.
Show Default Training and Support Link.	Select this check box if you want your new theme to display the default Training and Support link.
Show Record Type Links in the Footer Section	Select this check box if you want your new theme to display the record type links at the bottom of the page.
Support Head-Up Display Settings	Select this check box if you want your new theme to support the head-up display. You can remove the head-up display completely by deselecting this check box on a user's theme. **NOTE:** In addition to your theme supporting the head-up display functionality, users need to enable the Head-Up Display option in the Personal Detail page. If the Head-up Display field in the user's personal profile is blank, then the setting for the company is used. For more information on the head-up display , see Oracle CRM On Demand Page-by-Page Overview and Updating Your Personal Details.
Application Background	This field refers to the background of Oracle CRM On Demand. In the modern theme, this field also refers to the background of the Top section where the buttons are displayed.

General Information	Description
Application Text	This field is available for the classic theme only. It refers to the legal statement, which is at the bottom of the application page, and the vertical bars between the global links and tab links.
Application Links	This field is available for the classic theme only. It refers to the global links, which are at the top and bottom of Oracle CRM On Demand, for example, Admin, My Set-up, Privacy Statement, Terms of Use, and so on.
Alert Text	This field refers to the text used for mandatory fields and overdue tasks.
Tabs (Classic Theme Only)	
Tab Style	Select Rounded, Stacked, or Straight from the menu.
Active Tab Text	This field refers to the text used in the active tabs.
Active Tab Background	This field refers to the background colour of the active tab.
Inactive Tab Text	This field refers to the text used in the inactive tabs.
Inactive Tab Background - Top	This field refers to the colour of the upper background of the inactive tab.
Inactive Tab Background - Bottom	This field refers to the colour of the lower background of the inactive tab.
Inactive Tab Background Hover	This field refers to the colour displayed when you place the mouse over an inactive tab. It also refers to the colour used in the menu tab.
Global Header Section (Modern Theme Only)	
Background	This field refers to the background colour of the global header.
Top Section (Modern Theme Only)	
Text	This field refers to the text under the buttons.
Action Bar (Modern Theme Only)	
Action Bar Icon	This field refers to the colour of the Action bar triangle icon.

General Information	Description
Action Bar Text	This field refers to the text used in the Action bar.
Action Bar Links	This field refers to the links available in the Action bar, for example, the navigation links underneath the Favourite Records or Recently Viewed sections.
Action Bar Background	This field refers to the background colour displayed in the Action bar.
Buttons (Modern Theme Only)	
Button Background - Top	This field refers to the colour of the upper background of the button.
Button Background - Bottom	This field refers to the colour of the lower background of the button.
Button Border	This field refers to the colour used in the border of the button border.
Button Text	This field refers to the text used in the button.
Page (Classic and Modern Themes)	
Page Text	This field refers to all the text on the page or pop-up window, for example, inline help, field labels, field values, page titles, inactive links, form section headers, vertical bars, bullets, and so on.
Page Links	This field refers to all the links on the page background, for example, Show Full List link, Manage List link, and so on.
Page Background - Top	This field refers to the colour of the title bar at the top of each page and pop-up window, for example, Opportunity Details. Buttons are placed on this bar. This field also controls the Action bar, Related List, and Calendar Appointment pane. In the classic theme, this field controls the active calendar tab. **NOTE:** In the modern theme, the active calendar tab is replaced by a menu.

General Information	Description
Page Background - Bottom	This field refers to the colour of the title bar at the bottom of each page and pop-up window, for example, Opportunity Details. Buttons are placed on this bar. This field also controls the Action bar, Related List, Calendar view, and active Calendar tab.
Highlighted Page Background	This field refers to the colour of the highlighted items on a page, for example, the inline edit fields, the current day on a calendar, active step in wizards, head-up display background, and so on.
Page Header Text	This field refers to the text colour used for the page names, for example, Opportunities Homepage.
Page Header Background - Top	This field refers to the colour used for the upper area behind the page names.
Page Header Background - Bottom	This field refers to the colour used for the lower area behind the page names.
Section Header Lines	This field refers to the section header lines on Detail pages.
Page Lines	This field refers to the line colours used in the list records, form sections on detail pages, in wizard steps, and so on.
Page Icon	This field is available for the modern theme only. It refers to the colour used on the triangle icon, which is used to collapse and expand page sections.
Related Information Button Background	This field is available for the modern theme only. It refers to the colours used behind the Related Information button.
Lists (Classic and Modern Themes)	
List Header Text	This field refers to the text colour used on the filter bar, the list footer bar and in the time line of daily and weekly calendar views.
List Header Background	This field refers to the background colour of the time section in the daily and weekly calendar views, filter bar and the list footer that contains

General Information	Description
	the list navigation icons.
Column Header Text	This field refers to the text colour used in the column headers and in the day section of the calendar views in the modern theme.
Column Header Background	This field refers to the background colour on the related lists, full lists and in the day section of the calendar views in the modern theme.
Lines	This field refers to the colour of the horizontal lines within the list section.
Calendar (Classic and Modern Theme)	
Non Working Hours Background	This field refers to the background colour used to represent the hours in a calendar during which the user is not working.
Calendar Lines	This field refers to the line colours used in the Daily Calendar and Calendar View sections in Oracle CRM On Demand.
Appointment Background - Default	This field refers to the background colour of an appointment displayed in daily, weekly and monthly views of the calendar. This field is available only for modern themes.
Appointment Text - Links	This field refers to the links available in the calendar appointments, for example, the navigation links for the appointment, contact and account. This field is available only for modern themes. **NOTE:** If you use a classic theme, then the links in the calendar appointment appear in the same colour as the page links.
Appointment Text - Non Links	This field refers to the text colour used in appointments. This field is available only for modern themes. **NOTE:** If you use a classic theme, then the text in the calendar appointment appear in the same colour as the page text.

8 (Optional) If you want to add customised global links to your theme, click New in the Global Links section.

The Link Edit page opens.

9 Enter the following information:

- **Link Name.** Enter the name of the global link that you want to add to your theme.

- **Type.** Select Header or Footer from the menu, depending on whether you want to place your global link at the top or bottom of your page.
- **Link URL.** Enter the URL of your global link.
- **Link Order.** Enter a value to indicate the order in which the link is displayed. For example, if you enter the number one, the link is the first link in your global links.

10 Click Save. Or, if you want to add additional customised global links to your theme, click Save & New Link.

11 (Optional) If you want to add a specific logo to your theme, click Add Logo in the Logo section.

The Logo Edit page opens.

12 Click Browse to locate the image that you want to use as the header logo in your theme.

NOTE: You can upload images to use as a header logo with the following extensions: JPEG, JPG, PNG, or GIF. For the classic theme, Oracle CRM On Demand can display a header logo that is a maximum 45 pixels high. For the modern theme, Oracle CRM On Demand can display a header logo that is a maximum 50 pixels high. To ensure maximum coverage horizontally, it is recommended that the header logo is 1680 pixels wide. You must have permission to use and upload the image that you upload to your theme.

13 Enter the following information:

- **Name.** Enter the name of the logo that you want to add to your theme.
- **Logo Type.** Select Header or Footer from the menu, depending on whether you want to place your logo at the top or bottom of your page. If you select Header, your logo remains in the background behind the links and tabs. If you select Footer, the footer logo is placed at the links at the bottom of the application.

14 Click Save.

NOTE: You must sign out and sign in again to Oracle CRM On Demand to view the preview of the new logo that you added to the theme.

If you are using a custom created modern theme in Oracle CRM On Demand, then you can define in which colours different activities in your calendar are displayed.

15 Click New in the Calendar Activities section.

The Calendar Activities Detail page opens.

16 Enter the following information:

- **Activity Type.** Select the required calendar activity.
- **Order.** Enter a value to indicate the order in which the calendar activities are displayed in the calendar legend. The calendar legend displays the first four activity types when you view the daily and weekly calendar. The calendar legend displays the first six activity types when you view the monthly calendar.

17 Click Save. Or, if you want to define more calendar activities in your calendar, then click Save & New Calendar Activities.

The Calendar Activities section lists the activities which you want to display in specific colours in your calendar.

18 Click the following fields to define how each calendar activity is displayed in your calendar:

- **Activity Type.** Select the required calendar activity.
- **Order.** Enter a value to indicate the order in which the calendar activities are displayed in the calendar legend. The calendar legend displays the first four activity types when you view the daily and weekly calendar. The calendar legend displays the first six activity types when you view the monthly calendar.
- **Background Colour.** Enter a hexadecimal value, or select a colour from the colour palette, to define the background colour of your calendar activity.
- **Links Colour.** Enter a hexadecimal value, or select a colour from the colour palette, to define the colour in which links are displayed in your calendar activity.
- **Non Links Colour.** Enter a hexadecimal value, or select a colour from the colour palette, to define the colour in which text is displayed in your calendar activity.

NOTE: You must sign out and sign in again to Oracle CRM On Demand to view the changes to your calendar activities. For more information on using your calendar in Oracle CRM On Demand, see Working with the Calendar Pages.

Customising Previous Ownership for Shared Records

For record types for which sharing of records by a team is supported, you can customise that record type so that you retain the previous owner as part of the team when the Owner field is changed in Oracle CRM On Demand. The Customise Previous Owner page displays a list of record types that support record sharing by a team. For each record type, you can select the channels for which the previous owner of the record is retained in the team, and you can assign a new access role to the previous owner. For example, you can configure the Account record type so that when the owner of a shared account record is changed through interactive operations, the previous owner is retained in the team, and the previous owner is assigned a read-only access role for that record type.

For more information on ownership of records, see Transferring Ownership of Records and Sharing Records (Teams).

To customise previous ownership of records

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

2 In the Application Customisation section, click the Application Customisation link.

3 In the Application Setup section, click Customise Previous Owner.

The Customise Previous Owner page lists record types that support sharing of records by teams, and the corresponding channels and access profiles for those record types.

4 In the Customise Previous Owner page, click Edit to modify a channel or access profile for the previous owner of a record type.

5 From Select Channels, select one of the following:

- **Never Retain Owner.** This is 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.

6 From Access Profile, select a new access profile for the previous owner.

For more information on making other access profiles available for teams, see Process of Setting Up Access Profiles (on page 332).

7 Click Save.

About Fields, Picklists, and Metrics

The application does not allow you to change field names or picklist values that it uses for forecasting and reports. However, some of the prebuilt lists, such as lists on Homepages, select records to include based on the picklist values. The application uses the underlying, language-independent code to determine what records to include in the standard lists. Therefore, you can rename picklist values and fields without affecting those lists.

NOTE: In Oracle CRM On Demand (the standard application), the priority of tasks is indicated in task lists by arrows. An up arrow indicates 1-High priority, no arrow indicates 2-Medium priority, and a down arrow indicates 3-Low priority. If you change the display values for the Priority field in the Activity record type from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless you use the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that you give to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that you add to the picklist for the Priority field.

About Attachment Configurations

Depending on the record type, files can be attached to records in the following ways:

- Through the Attachments related item on parent records
- Through attachment fields

About Configuring the Attachments Related Item

On record types that support the preconfigured Attachments related item, you can configure page layouts and user roles to allow users to link multiple attachments to a parent record. Each attachment item can contain either a file or a URL. To allow users to attach files and URLs in this way, the page layouts and user roles must be configured as follows:

- The Attachments section must be available as a related information section on the page layout for the parent record type.
- The user role must have the necessary permissions for the Attachment record type.
- The access profiles for the user role must have the appropriate access to the Attachments related record type in the access setting for the parent record type.

For more information about customising page layouts, see Customising Static Page Layouts (on page 165) and Specifying Dynamic Page Layouts (on page 213). For more information about configuring user roles and access profiles, see User Management and Access Controls (on page 268).

The following record types support the preconfigured Attachments related item:

- Account
- Activity
- Campaign
- Contact
- Custom Objects 01, 02, and 03
- Dealer
- Event
- Fund
- Fund Request
- Household
- Lead
- Opportunity
- Partner
- Program Membership
- Service Request
- Solution

Attachments can also be linked to alert records and sales stage records.

Company administrators can view details of attachments added through the preconfigured Attachments related item. For more information, see Managing Your Company's Attachments (on page 816).

About Configuring Attachment Fields

Attachment fields allow users to attach a single file to a record. Attachment fields are supported for the following record types:

- Custom Objects 01, 02, 03, 04, and higher
- Inventory Audit Report
- Sample Transaction
- Signature

The following record types also support attachment fields. However, these record types can be used only as related items, as follows:

- Accreditation Attachment

  The Accreditation Attachment record type can be made available as a related item on the Accreditation record type only.

- Application Attachment

  The Application Attachment record type can be made available as a related item on the Application record type only.

- Business Plan Attachment

  The Business Plan Attachment record type can be made available as a related item on the Business Plan record type only.

- Certification Attachment

  The Certification Attachment record type can be made available as a related item on the Certification record type only.

- Course Attachment

  The Course Attachment record type can be made available as a related item on the Course record type only.

- Exam Attachment

  The Exam Attachment record type can be made available as a related item on the Exam record type only.

- MDF Request Attachment

  The MDF Request Attachment record type can be made available as a related item on the MDF Request record type only.

- Objective Attachment

  The Objective Attachment record type can be made available as a related item on the Objective record type only.

- Partner Program Attachment

  The Partner Program Attachment record type can be made available as a related item on the Partner Program record type only.

- Policy Attachment

The Policy Attachment record type can be made available as a related item on the Policy record type only.

- Special Pricing Request Attachment

  The Special Pricing Request Attachment record type can be made available as a related item on the Special Pricing Request record type only.

Some of these record types are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition and might not be available in your edition of Oracle CRM On Demand.

On some of these record types, the attachment fields are exposed on the standard page layout in Oracle CRM On Demand. You can expose the attachment fields on the Detail page layouts for all of the listed record types, as required. There are three attachment fields, as follows:

- **Attachment.** This field initially shows a paper clip icon on the record Edit page. After a file is uploaded, the field shows the name and size of the attachment file on the record Detail page. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. To allow users to attach a file to a record, you must expose this field on the page layout. The Attachment field cannot be used as a search field, because the file name and file size in this field are calculated values.
- **Attachment: File Name.** This is a read-only field that is automatically populated with the name of the file the user uploads. The Attachment: File Name field can be used as a search field. Exposing this field is optional.
- **Attachment: Size (In Bytes).** This field displays the size of the attachment. Exposing this field is optional.

For more information about customising page layouts, see Customising Static Page Layouts (on page 165) and Specifying Dynamic Page Layouts (on page 213).

About Configuring Custom Objects and Attachment Fields

You can configure the Custom Object record types in a number of ways to meet your company's business needs, as follows:

- You can configure a Custom Object record type as a related record type on another record type. (Custom Object record types are supported as related record types on most of the main record types in Oracle CRM On Demand.)

  In such a configuration, there is a one-to-many relationship between the parent record and the linked record type. When the attachment fields are exposed on the linked record type, this configuration allows users to link multiple attachments (one on each child record) to the parent record.

  For example, you can expose the attachment fields on the Detail page for Custom Object 04, and then rename Custom Object 04 so that it is labelled *Objective Attachment*. Then, you can make the new Objective Attachment record type available as a related information section on the Objective record type.

- You can configure Custom Object record types in many-to-many relationships with other record types, see About Many-to-Many Relationships for Custom Objects (on page 266) for more information.
- You can configure a Custom Object record type for use as an attachment record type and make it available as a top-level record type, with its own tab, homepage, lists, and so on.

Such a configuration could be used to give users access to literature that is of interest to a large number of users and would also allow users to search for attachments that were uploaded to records of the custom attachment record type.

As with any record type, you must ensure that users have the appropriate access levels in their user roles and access profiles to allow them to work with the record types where attachment fields are supported. For more information about configuring user roles and access profiles, see User Management and Access Controls (on page 268).

About Many-to-Many Relationships for Custom Objects

By default, all relationships between Custom Objects 01, 02, and 03 and other record types are many-to-many. However, for all other custom object record types (for example, Custom Object 04), any relationship between the custom object record type and any other record type (including other custom object record types) is one-to-many by default.

You can create many-to-many relationships for custom object record types by using another custom object record type as an intersection table.

Advantages of Using a Custom Object Record Type as an Intersection Table

Using a custom object record type as an intersection table, rather than using the many-to-many relationships with other record types provided within Custom Objects 01 to 03, has the following advantages:

- **Flexibility.** You have more flexibility to control the relationship between the objects. Using a custom record type as an intersection table allows direct access to the intersection records in the custom object record type. Custom Objects 01, 02, and 03 do not expose the intersection tables and their many-to-many relationships with other record types. Therefore, users cannot view or modify the intersection records. Custom Object 04 and higher record types are also more flexible because they allow you to determine which record types should have the many-to-many relationship. The many-to-many relationships of Custom Objects 01, 02, and 03 with other record types are preconfigured, and you cannot change them. For example, when using Custom Object 01, and if you require only one-to-many relationships between Custom Object 01 and Account, then it is stored as a many-to-many relationship. Custom Object 01 uses an additional record to store the relationship in the hidden intersection table even if it is not necessary, and this additional record is counted towards your company's record allotment. However, if you are using Custom Object 04, and if you require only a one-to-many relationship between Custom Object 04 and Account, then you can use the default one-to-many relationship provided. Otherwise, if you are not using Custom Object 04, then you can choose to use another custom object record type to create a many-to-many relationship between Custom Object 04 and Account.
- **Better integration.** Integration events are more efficient when you use a custom object record type as an intersection table. You can load many-to-many relationships directly into the custom object record type by using either the import tool in Oracle CRM On Demand or Web services. However, the import tool does not support importing relationships between Custom Objects 01, 02, and 03 and other record types. Also, integration events can track only the parent fields of Custom Objects 01, 02, and 03. Integration events cannot track any event that occurs for Custom Objects 01, 02, and 03 and their related record types, such as an association or dissociation with other record types. However, if you are using Custom Object 04 and higher record types as intersection tables, then you can track and detect any events that occur in the intersection table because it is a custom object record type with integration-event support.

- **Storing additional information.** You might want to store additional information about the many-to-many relationships between two record types, for example, a text field or more complex business model might require relationships with other record types. Custom Object 04 and higher record types support all custom fields available in Oracle CRM On Demand, enabling you to create custom fields in the intersection table. Custom Object 04 and higher record types also support relationships with other record types, allowing you to create relationships with the intersection table. Intersection tables for Custom Objects 01, 02, and 03 and other record types do not support custom fields or relationships with other record types.

Example of Creating a Many-to-Many Relationship

Your company owns and manages conference centres, and provides conferencing facilities to other companies, government clients, and so on. You want to use a custom object record type to track information about events and another custom object record type to track information about the rooms that are used for each event. Each room is used for many events, and each event can use a number of rooms, so that you must have a many-to-many relationship between the record types.

To create this many-to-many relationship, you can use a third custom object record type as an intersection table to track information about each room booking, or session. You can then create a one-to-many relationship between rooms and sessions, and a one-to-many relationship between events and sessions, which gives you a many-to-many relationship between rooms and events.

The following procedure describes how to configure the record types and relationships for this example. Custom Objects 04, 05, and 06 are used for the new record types.

To configure a many-to-many relationship

1. If the custom object record types that you want to use are not set up for your company, contact Customer Care to have them set up.

2. When Customer Care has set up the custom objects, rename Custom Object 04, 05, and 06 record types to Room, Event, and Session respectively.

   For information about renaming record types, see Renaming Record Types (on page 246).

3. For each user role that requires access to the new record types, set the required level of access in Step 2 Record Type Access of the Role Management Wizard. (The required level of access is determined by you, based on user responsibilities.)

   For information about setting up user roles, see Adding Roles (on page 309).

4. For each user role that requires access to the new record types, configure the access profile for the new record types.

   At a minimum, you must set up the following:

   - On the new Room record type, grant View access to the new Session related information section.
   - On the new Event record type, grant View access to the new Session related information section.

   For more information about setting up access profiles, see Process of Setting Up Access Profiles (on page 332).

5. Create new page layouts for the new record types:

- On the new Room record type Detail page layout, include the new Session record type as a related information section.
- On the new Event record type Detail page layout, include the new Session record type as a related information section.

For more information on setting up page layouts, see Customising Static Page Layouts (on page 165).

6 For each user role that requires access to the new record types, assign the page layouts that you created in Step 6 of the Role Management Wizard.

For information about setting up user roles, see Adding Roles (on page 309).

NOTE: In addition to the configuration changes described in the preceding procedure, you can customise the new record types in the same way that you customise other record types. For information about customising record types, see Record Type Application Customisation Page (on page 104).

User Management and Access Controls

This topic provides information on managing users and controlling access.

Before you begin. Do the following:

- Make sure that you have the appropriate privileges in your user role:
  - To access the User Management and Access Controls link on the Admin Homepage, your user role must include the Manage Users privilege, or the Manage Roles and Access privilege, or both of these privileges.
  - To set up users, your role must include the Manage Users privilege or the Manage Users within the Partner Organisation privilege.

    NOTE: Users who have the Manage Users within the Partner Organisation privilege can set up users in their own partner organisation only.
  - To set up access profiles and roles at your company, your role must include the Manage Roles and Access privilege.
  - To create, edit, or delete a group, your user role must include the Manage Roles and Access privilege. To add users to a group or remove users from a group, your user role must include both the Manage Roles and Access privilege and the Manage Users privilege.
  - To set up books, your role must include the Manage Books privilege.
  - To set up territories at your company, your role must include the Manage Territories privilege.
- Compare the number of licences against the number of users that must be active. Only active users can access Oracle CRM On Demand. The total number of active users cannot exceed the number of licences for your company. For more information on verifying the status of licences, see Verifying Licence Statuses and Active Users (see "Verifying License Statuses and Active Users" on page 47).
- Read the background information on roles and access profiles. See the following topics for more information:
  - Role Management (on page 302)

- Guidelines for Setting Up Roles (on page 303)
- Access Profile Management (on page 317)
- About Access Levels for Primary Record Types (on page 324)
- About Access Levels for Related Record Types (on page 325)
- How Access Rights Are Determined (on page 390)

- Determine what profiles you will use to manage data access for books, roles and teams.
- Determine the role that you want to assign to each user and to whom each user reports. If your organisation requires additional roles to accommodate multiple lines of business, create the new ones that you require.

The cumulative set-up of all users at your company defines your company's reporting hierarchy and sales quotas.

Individually, for each user at your company, you must specify a user role. A user's role and associated access profile determine an employee's access to tabs, features and records. They also determine which page layouts the employee sees when using the application.

Click a topic to see the procedure for managing users, access profiles, roles, custom books, and groups:

- Setting Up Users (on page 271)
- Setting Up Users' Sales Quotas (on page 286)
- Setting Up Default Books by Record Type for a User (on page 287)
- Changing a User's User ID (on page 287)
- Resetting a User's Password (on page 288)
- Resetting a User's DMS PIN (on page 289)
- Changing the Primary Division for a User (on page 289)
- Reviewing Sign-In Activity for a User (on page 290)
- Reviewing Security-Related Activities for Users (on page 291)
- Managing Delegated Users (Administrator) (on page 292)
- Creating Inventory Periods for Users (on page 295)
- Deactivating Users (on page 295)
- Process of Setting Up Partner Administrators (Administrator) (on page 296)
- Setting Up Users (Partners) (on page 298)
- Changing a User's User ID (Partners) (on page 300)
- Resetting a User's Password (Partners) (on page 301)
- Deactivating Users (Partners) (on page 301)
- Adding Roles (on page 309)
- Process of Setting Up Access Profiles (on page 332)
- Process of Setting Up Books (on page 362)

- Verifying Book Set-up for the Administrator Role (on page 363)
- Creating Book Types and Book User Roles (on page 366)
- Configuring Record Ownership Modes (on page 367)
- Creating Books and Book Hierarchies (on page 368)
- Associating Users with Books (on page 370)
- Creating Access Profiles for Books (on page 373)
- Enabling Books for Your Company (on page 374)
- Enabling Books for Users and User Roles (on page 375)
- Adding Books to Record Detail Page Layouts (on page 377)
- Assigning Records to Books (on page 378)
- Resetting Personalised Page Layouts (on page 336)
- Resetting Personalised Action Bar Layouts (on page 337)
- Resetting Personalised Homepage Layouts (on page 337)
- Setting Up Groups (on page 386)
- Setting Up Territories (on page 389)

TIP: Consider setting up a test user for each role. Then activate the test users to ensure that the configurations are set up correctly before activating other users. Do not activate other users until you have completed all user set-up activities, including access rights, role layout, reporting and data sharing hierarchy, workflow and any other business process customisation. Remember to deactivate test users when testing is complete.

User Management

A user is an entity in Oracle CRM On Demand with or without the ability to interact with Oracle CRM On Demand. For example, a user can be an employee in your company, a partner, or an external application. Users can be active or inactive. Active users can interact with Oracle CRM On Demand: inactive users cannot. To interact with Oracle CRM On Demand, an active user must be authenticated according to the sign-in and password policies set up for your company. For more information about sign-in and password policies, see About Sign-In and Password Policies (on page 48).

Each user has one assigned role. The same role can be assigned to multiple users. A role in Oracle CRM On Demand is similar to a business function that a user performs within an organisation, such as a sales executive function or a service manager function. Within your organisation, 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, a role defines the following:

- The features in Oracle CRM On Demand that a user has the privileges to use
- The set of permissions that a user is given to work with protected information
- The user interface settings that display information

For more information about roles, see Role Management (on page 302). To manage users, do the following tasks:

- Setting Up Users (on page 271)
- Setting Up Users' Sales Quotas (on page 286)
- Changing a User's User ID (on page 287)
- Resetting a User's Password (on page 288)
- Resetting a User's DMS PIN (on page 289)
- Changing the Primary Division for a User (on page 289)
- Reviewing Sign-In Activity for a User (on page 290)
- Reviewing Security-Related Activities for Users (on page 291)
- Managing Delegated Users (Administrator) (on page 292)
- Creating Inventory Periods for Users (on page 295)
- Deactivating Users (on page 295)

Related Topics

See the following topics for related information about user management:

- About User Page Layouts (on page 284)
- About User Delegation (on page 291)
- User Fields (on page 273)
- Viewing Audit Trails for Records
- Customising the Audit Trail (on page 206)

Setting Up Users

When setting up a user, the following fields require special care, because they determine what the user can access, view, and do:

- **Status field.** When you first set up a user, you can allow the user to access Oracle CRM On Demand immediately by setting the user's status to Active and prompting Oracle CRM On Demand to send the necessary sign-in information to the user when you save the user record, by selecting the appropriate option on the user record.

  Alternatively, if you do not want the user to access Oracle CRM On Demand until a later time, set up the user record, and set the user's status to Inactive. When you later want to allow the user to access Oracle CRM On Demand, change the status of the user to Active, and use the reset password functionality to send the necessary sign-in information to the user by email.

- **Reports To field or Reports To (Alias) field.** The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as reports for managers and executives. The page where you set up users can contain either the Reports To field or the Reports To (Alias) field, but must not contain both of these fields. For more information about

the Reports To and Reports To (Alias) fields, see About the Reports To and Reports To (Alias) Fields on User Records (on page 285).

TIP: Enter users who are at the top of the reporting hierarchy first.

- **Role field.** The user's role determines the user's access to tabs, features, records, and page layouts.

NOTE: You can import your user records using the import assistant. For more information about this option, see Import and Export Tools (on page 558).

About Sign-In Information for New Users

To sign in to Oracle CRM On Demand, a new user must have a temporary URL for Oracle CRM On Demand and a temporary password. You can prompt Oracle CRM On Demand to send the sign-in information to the user at the time that you create the user account, or you can do it at a later time, as follows:

- If you want to send the sign-in information at the time that you set up the user account, select the email check box on the user record before you save the user record for the first time.

  Depending on whether you use the Quick Add button or the Add User button to create the user record, the email check boxes are named as follows:

  - The Email check box on the Quick Add page
  - The Email Temporary Password When I Click Save check box on the User Edit page

  Note that you must select the check box before you save the record for the first time if you want the information to be sent to the user immediately. The sign-in information is sent to the user by email, in two parts:

  - One email contains a temporary URL.
  - The second email contains a temporary password and details of the user's sign-in ID.

- If you want to send the sign-in information to the user at a later time, do not select the email check box when you create the user record.

  Later, when you want to send the sign-in information to the user, you can prompt Oracle CRM On Demand to send the information by clicking the Reset Password button on the user record. When you click the Reset Password button, the sign-in information is sent to the user by email, in two parts:

  - One email contains a temporary URL.
  - The second email contains a temporary password.

  In this case, the email does not include details of the user's sign-in ID.

About Deleting Users

You cannot delete users. When an employee leaves your company, change the status for that user to Inactive.

Before you begin. To set up users at your company, your role must include the Manage Users privilege.

To set up a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, perform one of the following:
   - To add a new user, click New User.
   - To add several users quickly, click Quick Add.

     This opens the Quick Add page for you to enter required, limited information for each user. For example, it does not allow you to specify the reporting hierarchy.

     NOTE: You cannot use the Quick Add method if you have defined any other required User fields in addition to those on the Quick Add page.

     After entering information in the Quick Add window, click Save. This takes you to the User List page.
   - To edit a user's information, click the user's last name and on the User Detail page, click the Edit button.
5. On the User Edit page, complete the required information. For more information, see User Fields (on page 273).
6. Save the record.

TIP: You can limit the user records you see by creating filtered lists. For instructions, see Working with Lists.

To open a filtered list of users

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, select an option from the drop-down list.

User Fields

When setting up a user, the following fields require special care:

- Status
- Reports To or Reports To (Alias), depending on which of these fields is present on the user page layout
- Role

Entries for these fields determine what the user can access, view and perform.

This table describes some field information for users. To see all the fields listed in this table your role must include the Manage Users privilege. Some fields are read-only. Also, the fields you see might differ depending on whether you access the User Detail page by navigating from the User List page, or by drilling down on a user name in a record. These differences occur because different page layouts are used for these detail pages. For more information about user page layouts, see About User Page Layouts (on page 284).

Field	Description
Key User Information section	
Status	The status indicates whether the user is active or inactive. For information on the sequence for setting up users' passwords and activating users, see Setting Up Users (on page 271) and Resetting All Passwords (on page 57). **NOTE:** Oracle CRM On Demand does not allow you to delete users. When an employee leaves your company, change the Status for that user to Inactive.
Reports To	The manager for the user. Each user must report to a manager for reporting and forecasting purposes. **NOTE:** Depending on the user page layouts that are set up for your company, the Reports To (Alias) field might appear instead of the Reports To field. The Reports To (Alias) field shows the short identifier for the manager of the user.
Partner Organisation	The name of the partner organisation that the user belongs to. This field is populated only for users who are members of a partner organisation. **NOTE:** Users who are members of a partner organisation and have the Manage Users within the Partner Organisation privilege in their role can add other members of their partner organisation as users in Oracle CRM On Demand. If your user role allows you to set up users who are part of your partner organisation, this field is read-only.
Role	The role assigned to the user. To learn about roles, see Role Management (on page 302).
Primary Group	The group that this user has been added to. Read-only.
Default Book	(Optional) The user book or custom book that the user sees by default in the Book selector when working in any area other than the Analytics pages. This setting on the user record does not limit the user's access to records. The user can select a different book in the Book selector. **NOTE:** You can specify a default book for each record type for a user. For more information, see Setting Up Default Books by Record Type for a User (on page 287). If a default book is specified for a record type for the user, then in the Book selector, the default book for the record type takes precedence over the

Field	Description
	default book that is specified in the Default Book field on the user's profile.
Default Book for Analytics	(Optional) The user book or custom book that the user sees by default in the Book selector in the Analytics pages. This setting on the user record does not limit the user's access to data. The user can select a different book in the Book selector.
Preserve Default Book	This check box applies to the Book selector in all areas of Oracle CRM On Demand except the Analytics pages. The Preserve Default Book check box works as follows: ■ If this check box is selected, then the Book selector shows the book that is selected in the Default Book field in the user's profile each time that the user opens any page or window where the Book selector is available. The user can select a different book in the Book selector in any page or window. However, the next time that the user revisits that page or window, or opens any other page or window where the Book selector is available, the user sees the default book in the Book selector. The user's earlier selection in the Book selector is lost. ■ If this check box is not selected, then the Book selector shows the book that is selected in the Default Book field in the user's profile until the user selects a different book in the Book selector. After the user selects a different book in the Book selector, the user continues to see the new book in the Book selector for that record type until the user signs out and signs in again.
User Detail Information section	
Alias	A short identifier for the user, for example, the user's preferred name or nickname. If you add users through the Quick Add page, all the characters before the at sign (@) in the email address become the alias.
User ID	A unique system identifier for the user to sign in to Oracle CRM On Demand. The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters: ■ Asterisk (*) ■ Backslash (\) ■ Number sign (#) ■ Question mark (?)

Field	Description
	■ Slash (/) ■ Tilde (~) Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the User ID field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 19).
Email	The complete email address for the user, such as isample@companysample.com. Users must have a valid email address to be granted access to Oracle CRM On Demand. The maximum number of characters that the email address can contain is 100. Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the Email field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 19).
Secondary Email	You can use this field to store an additional email address for a user. Oracle CRM On Demand does not send any notification or alert emails to this address.
User Sign-In ID	Read-only field. This value is a combination of the company sign in ID and the user ID and is the unique system identifier for the user to sign in to Oracle CRM On Demand.
Contact Preferences	
Never Call	If this check box is selected, the user does not receive calls from Oracle CRM On Demand Marketing.
Never Mail	If this check box is selected, the user does not receive letters or brochures from Oracle CRM On Demand Marketing.
Never Email	If this check box is selected, the user does not receive emails from Oracle CRM On Demand Marketing.
Always Send Critical Alerts	If this check box is selected, the user receives emails containing important information from Oracle CRM On Demand. These messages include: ■ Critical information about product updates and service changes for Oracle CRM On Demand and related products ■ Instructions and schedules for upgrades to major new

Field	Description
	releases ■ High priority or emergency communications to supplement normal support processes (for example, in the case of a hardware failure) Only company administrators have the ability to update this check box for users. Primary contacts automatically have this check box enabled. **NOTE:** This check box is not used to determine which users receive the system alerts issued by Oracle CRM On Demand Customer Care, such as reminders for upcoming scheduled maintenance.
User Geographic Information section	
Language, Locale, Currency, Time Zone	If you do not set any values in these fields, the default values that were set up for the company are used. You can change the values for the user. Users can also override these settings when they edit their personal preferences.
User Security Information	
Reporting Subject Areas	This setting defines the user's visibility to records in real-time reports in Analytics. These reports provide real-time analyses of data. You can select one of the following values: ■ **Manager Visibility.** Allows the user to see data owned by the user and data owned by the user's subordinates. (This is the default setting.) ■ **Team Visibility.** Allows the user to see data owned by the user and data shared with the user through teams. If you do not define the Reporting Subject Areas setting, then the company-wide setting that is set up by your administrator applies. For more information on reports, see Analytics, particularly the About Visibility to Records in Analytics topic. You can change the value for the user. Users can also override this setting when they edit their personal preferences.

Field	Description
Historical Subject Areas	This setting defines the user's visibility to records in historical reports in Analytics. The allowed values are as follows: ■ **Manager Visibility.** Allows the user to see data owned by the user and data owned by the user's subordinates. (This is the default setting.) ■ **Team Visibility.** Allows the user to see data owned by the user and data shared with the user through teams. ■ **Full Visibility.** Allows the user to see data owned by and shared with the user and data owned by and shared with the user's subordinates. If you do not define the Historical Subject Areas setting, then the company-wide setting that is set up by your administrator applies. You can change the value for the user. Users can also override this setting when they edit their personal preferences.
Role-Based Can Read All Records	Use this picklist to specify whether you want Analytics to use the Can Read All Records setting on a record-type basis, as defined on the Record Type Access page within the Role management wizard. If the Role-Based Can Read All Records setting is enabled through either the company profile or your user profile, and if the Can Read All Records visibility setting is selected by your administrator for your user role on a given record type, then you can view all records of that record type in Analytics. See About the Role-Based Can Read All Records Setting for guidance on when and how to enable the Role-Based Can Read all Records setting. If the Role-Based Can Read All Records setting is not enabled, then Analytics uses the visibility set on the Reporting Subject Areas and Historical Subject Areas fields.
External Unique ID	You can use this field to store an identifier for the user in an external system.
Integration ID	You can enter a value in this field, or you can allow the field to take a default value. Depending on how the user record is created, the Integration ID field takes a default value as follows: ■ For user records created through the user interface: ■ If the Integration ID field is present in the Page Layout and no value is entered in the field, then the field takes the temporary Row ID allocated to the user record before the record was first saved. ■ If the Integration ID field is not present in the user page layout, then the field takes the value of the Row ID field

Field	Description
	of the user record. ■ For user records created through any channel other than the user interface, if no value is entered in the Integration ID field, then the field takes the value of the Row ID field of the user record. You can change the value in the Integration ID field.
External Identifier for Single Sign On	If your company is set up to use Single Sign-On, the company administrator can use this field when mapping users in Oracle CRM On Demand to an external system, rather than using the User Sign In ID field. When users view their personal profile, this field is read-only. Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the External Identifier for Single Sign On field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 19).
Authentication Type	Determines how the user signs in to Oracle CRM On Demand. If the authentication type at company level is anything other than User ID/PWD or Single Sign-On, this field is read-only on the user record. If the authentication type at company level is User ID/PWD or Single Sign-On, company administrators can select a value or leave this field blank on the user record as follows: ■ **User ID/Password Only.** If this value is selected, the user must sign in using their Oracle CRM On Demand User Sign In ID and password. ■ **Single Sign-On Only.** If this value is selected, the user must sign in using your company's single sign-on mechanism. When this value is selected, the user cannot sign in using an Oracle CRM On Demand User Sign In ID and password. ■ **User ID/PWD or Single Sign-On.** If this value is selected, the user can sign in using either their User Sign In ID and password for Oracle CRM On Demand, or through your company's single sign-on method. ■ **Blank.** If this field is blank on the user profile, then the company-level Authentication Type setting is used for the user. When users view their personal profile, this field is read-only. **NOTE:** If the User ID/PWD or Single Sign-On value is selected, then your company's policies for passwords in Oracle CRM On Demand continue to be enforced. So, when a user's password in

Field	Description
	Oracle CRM On Demand expires, Oracle CRM On Demand prompts the user to change the password, even if the user signs in using Single Sign-On. All other policies for passwords in Oracle CRM On Demand are also enforced, such as the minimum length of the password, the required complexity of the password, and so on. Oracle CRM On Demand does not manage the passwords that are used for Single Sign-On. For more information about setting the authentication type at company level, see Setting Up Your Company Profile and Global Defaults (on page 19).
Password State	Indicates the state of the user's password (read-only). Possible values are: ■ **Active.** The user's password is valid. ■ **Disabled / Temporary.** The user submitted a request for the password to be changed, or an administrator reset the password for the user, but the user has not yet saved a new password. ■ **Inactive.** The Status field on the user record was previously set to Inactive, and the current credentials for the user cannot be used to sign in to Oracle CRM On Demand. If the Status field is changed to Active, then reset the user's password to allow the user to sign in. ■ **Locked-Out.** The number of consecutive, failed attempts to sign in using the assigned password exceeded the number allowed by the Maximum Number of Current Password Attempts setting, and the lockout period specified in the Sign In Lockout Duration setting has not expired. ■ **Password Expired.** The user's password has expired. The length of time that user passwords are valid is determined by the Expire User Passwords In setting. ■ **Temporary Password Expired.** A temporary password was assigned to the user, but the user did not sign in with the temporary password within the time allowed by the Number Of Days Temporary Sign In Is Valid setting. You must reset the password again. ■ **Temporary Password Locked-Out.** The number of consecutive, failed attempts to sign in using a temporary password exceeded the number allowed by the Maximum Number of Current Password Attempts setting, and the lockout period specified in the Sign In Lockout Duration setting has not expired. **NOTE:** The settings referenced in the above descriptions are available on the Company Sign In and Password Control page. For more information about these settings, see Defining Your

Field	Description
	Company's Password Controls (on page 49).
Communications Settings section	
Display Click-to-Dial Popup	This check box is for users who are set up with Oracle Contact On Demand. Oracle Contact On Demand renders phone numbers as links that users can click on the List and Detail pages. If you select the Display Click-to-Dial Popup check box for the user, then when the user clicks a phone number link, the user is prompted with a Click-To-Dial window before the Oracle Contact On Demand telephony system places the call.
Display Communication Homepage Inbox for	Select a value from the menu to determine the period during which the Communication Homepage Inbox displays activities for the user, for example, Last Month, Last Day, and so on. The shorter the period, the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all communications. The user must sign out and sign in again for a change to this setting to take effect.
Display Communication Homepage recently completed activities for	Select a value from the menu to determine the period during which the Communication Homepage displays recently completed activities for the user, for example, Last Month, Last Day, and so on. The shorter the timeframe, the fewer the number of communications activities that are displayed. If you select All from the menu, or leave the menu blank, then the Communications page displays all activities. The user must sign out and sign in again for a change to this setting to take effect.
Additional Information section	
Default Theme	The theme that is used when the user signs in to Oracle CRM On Demand using a desktop or laptop computer. Users can override this setting when they edit their personal preferences. If a default theme is not selected in the user's record, then the default theme that is selected for the user's role is used. If a default theme is not selected in either the user's record or the user's role, then the default theme that is specified for the company is used. **NOTE:** Themes have no effect on how Oracle CRM On Demand behaves. If your user role has the appropriate privilege, you can create new themes according to company requirements. For more information about themes, see Creating New Themes (on page 253).
Tablet Theme	(Optional) The theme that is used when the user 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. Users can override this setting when they edit their personal preferences. If a tablet theme is not selected in the user's record, then the tablet theme

Field	Description
	that is selected for the user's role is used. If a tablet theme is not selected in either the user's record or the user's role, then the tablet theme that is specified for the company is used. If a tablet theme is not specified at any level, then the default theme is used.
Default Search Record Type	The record type that appears in the search picklist in the Action bar when the user signs in to Oracle CRM On Demand.
Show Welcome Page on Sign In	To prevent the Welcome page from appearing each time the user signs in to Oracle CRM On Demand, deselect this check box. **NOTE:** Users can also deselect the Show Welcome Page on Sign In check box in the Welcome page when they sign in.
Fund Approval Limit	This field is for users of Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition. The amount that this user can approve for each fund request when setting the status to Claim Approved. If the user tries to exceed this limit, an error message appears, and Oracle CRM On Demand prevents the fund request approval.
Enable Message Centre Animation	Determines whether the display of notes in the Message Centre and record Details pages is animated.
Record Preview Mode	The user's record preview mode. Depending on the setting here, the preview window opens when the user hovers a pointer over a link to a record, or when the user clicks on a preview icon that appears when the pointer is hovered over a link to a record. The preview window shows the first section of the Detail page of the record. Selecting Off in this field disables the record preview functionality for the user. The record preview setting can be specified at company level and at user level. The setting at user level overrides the setting for the company. If this field is blank, the record preview setting for the company is used. Users can change this setting when they edit their personal preferences.
Head-up Display	If the head-up display functionality is turned on, and if the Support Head-up Display Settings check box is selected on the user's theme, then the user sees links for the related information sections on a detail page at the bottom of the browser window. The links allow the user to jump to a related information section without having to scroll down the page. The head-up display functionality can be turned on or off at the company level and at the user level. The setting at the user level overrides the setting for the company. If this field is blank, the head-up display setting for the company is used. Users can change this setting when they edit their personal preferences.

Field	Description
	If the Support Head-up Display Settings check box is not selected on the user's theme, then the head-up display is not available, even if the head-up display functionality is turned on at company level or at user level.
Related Information Format	Determines if the related information sections on record Detail pages are shown as lists or as tabs. If the Related Information Format field in the user's record is blank, then the setting for the user's role is used; and if the Related Information Format field on the user role is blank, then the setting for the company is used.
Freeze List Column Header	Determines whether the column headings in List pages always remain in view when the user scrolls down a page of records. This functionality can be turned on or off at company level and at user level. The setting at user level overrides the setting for the company. If this field is blank, then the setting for the company is used.
User Time Zone Support for Reporting Subject Areas	If this check box is present and selected on the user's profile, then the dates and times shown in real-time reports are displayed according to the user's time zone. If this check box is deselected on the user's profile, then the dates and times shown in reports are displayed according to the company's time zone. To enable this setting for users, the company administrator must add this field to the User Admin page layout for the administrator's role. To allow users to enable or disable this setting in their personal profile, the company administrator must add this field to the User Owner page layout for the relevant user roles.
Primary Division	The Primary Division field is not present on the User Detail page by default, but the company administrator can add it to the User Admin page layout. If your company uses the Division record type to organise your users into groupings to meet your business needs, then each user can be associated with one or more divisions. The first division that is associated with a user is automatically designated as the user's primary division, and the name of that division is shown in the Primary Division field on the user's record. Your company administrator can change the primary division on a user's record. For more information about divisions, see Division Set-up (see "Division Setup" on page 69). **NOTE:** A text field named Division is also available on the User record type. The Division text field on the User record type is not related to the Division record type.

Field	Description
Customised Code Enablement	This picklist field determines whether all customised code on the pages in Oracle CRM On Demand is enabled or disabled for the user, and whether the customised code indicator is enabled or disabled for the user. The following options are available: ■ **Enabled.** This is the default setting in the standard application. When this option is selected, all of the customised code that is available in the pages in Oracle CRM On Demand is enabled, but the customised code indicator is not enabled. ■ **Enabled with indicator.** When this option is selected, all of the customised code that is available in the pages in Oracle CRM On Demand is enabled. In addition, the customised code indicator is enabled. ■ **Disabled with indicator.** When this option is selected, all of the customised code that is available in the pages in Oracle CRM On Demand is disabled. In addition, the customised code indicator is enabled. For more information about customised code and the customised code indicator, see About Enabling and Disabling Customised Code and the Customised Code Indicator. To change the setting in this field, the administrator must add this field to the User Admin page layout for the administrator's role. To allow users to change this setting in their personal profile, the administrator must add this field to the User Owner page layout for the relevant user roles.

NOTE: Users who have both the Manage Users and Access - Manage Delegated Users privilege and the Manage Users privilege (typically the company administrator) can appoint delegates for other users. Users who have the Manage Users and Access - Manage Delegated Users privilege can appoint delegates for themselves. For more information about appointing delegates, see About User Delegation (on page 291), Adding Delegated Users, and Managing Delegated Users (Administrator) (on page 292).

About User Page Layouts

You can define a number of types of page layouts for user records. The page layout types correspond to different views of the user details in Oracle CRM On Demand. The following types of user page layouts are available from the User Application Customisation page:

- **User Page Layout.** This type of page layout is used for the user detail pages that are displayed when you drill down on a user name from a record or from the Recently Viewed or Favourites lists. All users in the company can see these user detail pages. No related information sections are available for the page layouts of this type, but users can personalise the layout of the fields in the page, if their user role allows them to do so. For more information, see Changing Your Detail Page Layout.
- **User Admin Page Layout.** This type of page layout is used for the user detail pages that are displayed from the User List page under User Management and Access Controls.

- **User Owner Page Layout.** This type of page layout is used for the Personal Detail page in My Set-up. Users can control the layout of the fields and the related information sections in their Personal Detail page, if their user role allows them to do so. For more information, see Changing Your Detail Page Layout.
- **Partner Admin Page Layout.** This type of page layout is used for the user detail pages that are displayed when partner users access user records from the Partner Self Administration link. To access the Partner Self Administration link, partner users must have the Manage Users within the Partner Organisation privilege.

The separate user page layout types are useful when you have user fields that contain private data. In this situation, you do not want the private fields to be visible when a user drills down on a user name from a record. You can therefore make the private fields available in the page layouts of the User Owner layout type or the User Admin layout type, but you can make the private fields unavailable in the page layouts of the User layout type.

Page layouts are assigned to particular roles. Therefore, by assigning the appropriate page layouts to a role, you ensure that users with that role cannot see any private fields that they should not be able to see.

The following are examples of the types of field that can be useful to track as private fields for particular roles:

- Inside Sales Rep
  - Number of qualified leads that are not rejected
  - Number of leads contacted for each month
- Field Sales Rep
  - Cost of converting lead to customer
- Marketing Manager
  - Campaign effectiveness (the amount spent compared with the amount of revenue)
- Regional Sales Manager
  - Number of lost customers for each quarter
  - Volume of revenue stream lost to regional competitors

The separate user page layout types are also useful when you want to make fields read-only for some users. In this case, you make the fields available as read-only fields in the page layouts of the User Owner layout type for user roles that you do not want to be able to edit the fields.

CAUTION: Certain restrictions apply to adding the Reports To field and the Reports To (Alias) field to user page layouts. For more information, see About the Reports To and Reports To (Alias) Fields on User Records (on page 285).

For more information about creating page layouts, see Customising Static Page Layouts (on page 165); for information about setting up roles, see Adding Roles (on page 309).

About the Reports To and Reports To (Alias) Fields on User Records

The manager information on a user record is used in the reporting hierarchy and in forecasting. One of the following fields must be present on each page layout of the User Admin or Partner Admin layout type so that you can specify a manager for the user:

- **Reports To.** This field shows the full name of the user's manager.
- **Reports To (Alias).** This field shows the short identifier for the user's manager.

However, when you create your user page layouts, you must not add both of these fields to the same user page layout. If the Reports To field and the Reports To (Alias) field were both made available on a page layout, then any user whose role has that page layout assigned to it cannot use the inline edit feature in lists of user records or in user detail pages.

Similarly, do not add both the Reports To field and the Reports To (Alias) field to the same search layout for the user record type. If both of these fields are made available on a search layout, then any user whose role has that search layout assigned to it cannot search for user records; that is, the search fails.

Setting Up Users' Sales Quotas

If sales representatives use Oracle CRM On Demand to manage their forecasts, their quotas must be set up. Sales representatives can set up their own quotas or, as an administrator, you can create quotas for them. When selecting the year for a quota to start, you can select the current calendar year, or one of the preceding three years, or one of the upcoming three years.

This section describes the procedure for the administrator to set up a user's quotas.

To set up a user's quota

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose quota you want to set up.
5. On the User Detail page, scroll down to the Quotas section and do one of the following:
   - Click the New Quota button.
   - Click the Edit link for the quota you want to edit.
6. On the Edit Quota page, complete the fields.
   - To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
   - To add the monthly quotas together, enter an amount for each month and click Sum.
7. Save the record.

Setting Up Default Books by Record Type for a User

You can specify a default book for each record type for a user. The user sees the specified book by default in the Book selector for the record type. However, specifying a default book does not limit the user's access to records. The user can select a different book in the Book selector.

If you select a custom book as the default book for a record type, and if the record type is configured in book mode, then when the user creates a record of that record type, the Book field on the record is automatically populated with the name of the default book. If you select a user book or the All book as the default book for a record type, then when the user creates a record of that record type, the Book field on the record is not automatically populated with the name of the default book, even if the record type is configured in book mode. For more information about the book mode and other record ownership modes, see About Record Ownership Modes (on page 346).

The following procedure describes how to set up default books by record type for a user.

To set up default books by record type for a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click User Management.
4. On the User List page, click the Last Name link for the user whose default books you want to set up.
5. On the User Detail page, scroll down to the Default Book by Record Type section, and do one of the following:
   a. Click New to add a default book for a record type.
   b. Click the Edit link for the default book that you want to change.
6. In the Add Default Book by Record Type page, select the record type and the book setting.
7. Save your changes.

Changing a User's User ID

You can change the user ID for a user.

The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:

- Asterisk (*)
- Backslash (\)
- Number sign (#)
- Question mark (?)

- Slash (/)
- Tilde (~)

Before you begin. To perform this procedure, your role must include the Manage Users privilege. To allow users to change their email address or user ID, you must set up the Sign In and Password Control feature. For instructions, see Defining Your Company's Password Controls (on page 49).

To change a user's User ID

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link of the user.
5. On the User Detail page, click Edit.
6. On the User Edit page, edit the User ID field.
7. Save the record.

Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the User ID field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 19).

The user can sign in to Oracle CRM On Demand by using the new user ID and the user's existing password.

Resetting a User's Password

In Oracle CRM On Demand, users must provide answers to a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they are locked out and want immediate access, you can reset their password.

NOTE: This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before emailing the temporary password.

Before you begin. To perform this procedure, your role must include the Manage Users privilege and the Manage Company - Reset All Passwords privilege. In addition, the role of the user whose password you want to change must include the Reset Personal Password privilege.

To reset a user's password

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

2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose password you want to reset.
5. On the User Detail page, on the title bar, click the Reset Password button.

   The user's existing password is replaced with a new temporary password. The new temporary password is sent to the user by email.

   NOTE: This event is recorded in the Sign In History section on the User Detail page.

Resetting a User's DMS PIN

A personal identification number (PIN) is used to manage a user's access to Oracle CRM On Demand Disconnected Mobile Sales. Resetting the PIN forces the user's account in Oracle CRM On Demand Disconnected Mobile Sales to reauthenticate before accessing Oracle CRM On Demand data.

Oracle CRM On Demand Disconnected Mobile Sales is an independent product. Oracle CRM On Demand users are not automatically licensed to use Oracle CRM On Demand Disconnected Mobile Sales. If Oracle CRM On Demand Disconnected Mobile Sales is provisioned for a user, then Oracle CRM On Demand automatically manages the user's access to Oracle CRM On Demand Disconnected Mobile Sales. For example, the user's password and account status remain synchronised across both systems, with a short delay. To force synchronisation, you need to explicitly reset a user's PIN. For example, you might force synchronisation immediately after you disable a user's account in Oracle CRM On Demand, to ensure that the user's account in Oracle CRM On Demand Disconnected Mobile Sales is disabled at the same time.

Before you begin. To perform this procedure, your role must include the Manage Users privilege.

To reset a user's DMS PIN

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose PIN you want to reset.
5. On the User Detail page, on the title bar, click Reset DMS PIN.

Changing the Primary Division for a User

If your company uses the Divisions record type, then users can be associated with divisions. For more information about divisions and about associating users with divisions, see Division Setup (on page 69) and Associating Users with Divisions (on page 72).

Before you begin. To perform the following procedure, you must have both the Manage Users privilege and the Manage Roles and Access privilege in your user role. In addition, the Primary Division field must be present on the User Admin page layout that is assigned to your role for the User record type.

To change the primary division for a user

1. Click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the User and Group Management section, click the User Management link.
4. In the User List, click the last name of the user whose primary division you want to change.
5. On the User Detail page, in the Primary Division field, click the Lookup icon and select the division that you want to be the primary division for the user.

Reviewing Sign-In Activity for a User

You can review the sign-in history for each user at your company.

NOTE: User sign-in records that are older than 90 days are continuously purged from Oracle CRM On Demand. The user adoption history data is stored in the data warehouse to support the historical trend analysis of user adoption metrics in Oracle CRM On Demand analytics, but the data is not retained when a full extract, transform, and load (ETL) of data is performed during an upgrade of Oracle CRM On Demand to a new release, or when company data is migrated from one Oracle CRM On Demand environment to another Oracle CRM On Demand environment. For information about the Usage Tracking Analysis analytic subject area, see Usage Tracking Analysis Analytic Subject Area.

Before you begin. To perform this procedure, your role must include the Manage Users privilege.

To review sign-in activity for a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose sign-in activity you want to view.
5. To review the user's sign-in activity, scroll down to the Sign-in History section.

   NOTE: The Type field in a sign-in record shows the channel through which the sign-in attempt was made. For example, if a sign-in attempt is made through a browser window, then the Type field shows the value Interactive. If a sign-in attempt is made through Web services, then the Type field shows the value Web Services.

Reviewing Security-Related Activities for Users

You can review details of security-related activities in the Audit section of the user record.

About the Audit and Audit Trail Sections on User Records

Audit information is displayed in two related information sections on the user record, as follows:

- **Audit section.** The Audit section shows information about security-related activities, such as when the user's password was set initially and when the password was reset.
- **Audit Trail section.** The Audit Trail section on the user record shows the changes to certain fields on the user record. A number of fields are audited by default, but company administrators can specify that additional fields are to be audited. Company administrators can also view audit trail information for users in the Master Audit Trail. For information about customising audit trails for record types, see Customising the Audit Trail (on page 206). For information about viewing audit trails for individual records, see Viewing Audit Trails for Records. For information about viewing audit trail information in the Master Audit Trail, see Reviewing Audit Trail Changes with the Master Audit Trail (on page 79).

Before you begin. To perform the following procedure, your role must include the Manage Users privilege.

To review security-related activities for a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user that you want to view.
5. Scroll down to the Audit section to review details of the security-related activities on the user record.

About User Delegation

When the delegated users feature is enabled, users can delegate owner access of their records to other users. In addition, users who have the appropriate privileges can appoint delegates for other users. Typically, only company administrators can appoint delegates for other users.

The delegated users feature is controlled using the following check boxes on the Company Profile page:

- Manager Visibility Enabled
- Display Book Selector

For the delegated users feature to work, both of these check boxes must be selected. In addition, the Delegated To Users and the Delegated From Users related information sections must be available on the relevant page layouts for the user's or administrator's role, as follows:

- To allow a user to appoint delegates, the Delegated To Users related information section must be available on the User Owner page layout for the user's role.
- To allow a user to see a list of the users for whom the user is a delegate, the Delegated From Users related information section must be available on the User Owner page layout for the user's role.
- To allow administrators to appoint delegates for other users, at least one of the following related information sections must be available on the User Admin page layout for the administrator's role:
  - **Delegated To Users.** In the Delegated To Users section of a user's record, the administrator can appoint delegates for the user.
  - **Delegated From Users.** In the Delegated From Users section of a user's record, the administrator can appoint the user as a delegate for other users.

To appoint delegates for other users, your role must include the following privileges:

- Manage Users
- Manage Users and Access - Manage Delegated Users

To appoint delegates for themselves, users must have the Manage Users and Access - Manage Delegated Users privilege in their role.

When appointing delegated users, note the following information:

- The Delegated User Role field is not related to the user role or to data access in any way. It is a picklist that a company administrator can define to categorise the user delegates. This picklist does not have any default values. The company administrator can customise it, as necessary, from the Delegated Users Field set-up page. For more information about customising picklists, see Changing Picklist Values (on page 158).
- Delegated users gain the primary user's owner access to the records that the primary user owns or has access to through teams or groups. Delegated users do not gain the primary user's default access to records.
- For any record type, the delegated user must have the Has Access option enabled in his or her user role to be able to see records of that type using delegated access. Similarly, the delegated user must have the Can Create option for a record type enabled in his or her user role to be able to create records of that type.
- Delegated users can use the Include sub-items option in the Book selector to see all of their own records and those of the primary user in lists. Alternatively, they can select their own name to see only the records they have access to through ownership, role, team, and so on. Or, they can select the name of the primary user to see only the records that the primary user owns or can access through a team or a group.
- The delegated user's level of access to data (that is, Manager Visibility, Team Visibility, or Full Visibility) for reporting subject areas and historical subject areas continues to apply, even when the delegated user is looking at data delegated by a primary user.

Managing Delegated Users (Administrator)

As a company administrator, you can appoint users as delegates for other users. For more information about how user delegation works, see About User Delegation (on page 291).

NOTE: Users can also appoint delegates for themselves through their Personal Detail page. For more information on how users can appoint delegates, see Adding Delegated Users.

To perform the procedures described in this topic, your role must include the following privileges:

- Manage Users
- Manage Users and Access - Manage Delegated Users

In addition, at least one of the following related information sections must be available on the User Admin page layout for your role:

- **Delegated To Users.** In the Delegated To Users section of a user's record, you can appoint one or more delegates for the user.
- **Delegated From Users.** In the Delegated From Users section of a user's record, you can appoint the user as a delegate for one or more users.

If the Delegated To Users and the Delegated From Users related information sections are not visible in the User Detail page where you want to appoint a delegate, you can make the sections available as follows:

- In the User Detail page, click Edit Layout in the upper-right corner of the page, and add the sections to your page layout.
- If the related information section that you want is not available to add to your page layout, you can customise the User Admin page layout for your role. For more information about customising page layouts, see Customising Static Page Layouts (on page 165).

To appoint one or more delegates for a user, complete the steps in the following procedure.

To appoint one or more delegates for a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. On the User Management and Access Controls page, click User Management.
4. On the User List page, click the Last Name link for the user for whom you want to add delegates.
5. On the User Detail page, scroll down to the Delegated To Users section, and click Add in the title bar of that section.
6. On the Delegated Users Edit page, click the Lookup icon.
7. In the Lookup window, select the users whom you want to appoint as delegates.
8. If values are defined in the Delegated User Roles field, then you can optionally select a delegated user role for each user.
9. Save your changes.

NOTE: In the Delegated To Users section of the User Detail page, the Role field shows the role of the delegate in Oracle CRM On Demand. The Delegated User Role field shows the delegated user role for the delegate, if one is defined.

To remove a delegate from the list of delegates for a user, complete the steps in the following procedure.

To remove a delegate from the list of delegates for a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. On the User Management and Access Controls page, click User Management.
4. On the User List page, click the Last Name link for the user whose list of delegates you want to update.
5. On the User Detail page, scroll down to the Delegated To Users section.
6. In the record-level menu, select Remove for the user whom you want to remove from the list of delegates.
7. Click OK to confirm the change.

To appoint a user as a delegate for one or more users, complete the steps in the following procedure.

To appoint a user as a delegate for one or more users

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. On the User Management and Access Controls page, click User Management.
4. On the User List page, click the Last Name link for the user that you want to appoint as a delegate for one or more users.
5. On the User Detail page, scroll down to the Delegated From Users section, and click Add in the title bar of that section.
6. On the Delegated Users Edit page, click the Lookup icon.
7. In the Lookup window, select the users for whom you want to appoint the current user as a delegate.
8. Save your changes.

In certain circumstances, such as when a user moves to a different section within your company, you might want to revoke a user's permission to act as a delegate for one or more users. To revoke a user's permission to act as a delegate for one or more users, complete the steps in the following procedure.

To revoke a user's permission to act as a delegate for one or more users

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. On the User Management and Access Controls page, click User Management.

4 On the User List page, click Last Name for the user whose permission to act as a delegate you want to revoke.

5 On the User Detail page, scroll down to the Delegated From Users section.

6 For each user for whom you no longer want the current user to act as a delegate, select Remove from the record-level menu, and then click OK to confirm the change.

Creating Inventory Periods for Users

This topic is specific to Oracle CRM On Demand Life Sciences Edition. You must create an inventory period for each sales representative who uses Oracle CRM On Demand Life Sciences Edition. You must do this only once for each sales representative. You can create inventory periods manually, or using the import function in Oracle CRM On Demand.

NOTE: Typically, inventory periods are populated through the import function when Oracle CRM On Demand is first set up for a company.

After you create the initial inventory period for a sales representative, each time an inventory period is closed for the sales representative, a new inventory period is automatically created.

Before you begin. To perform this procedure, your role must include the Manage Users privilege.

To create an inventory period for a user

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

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

3 On the User Management and Access Controls page, click the User Management link.

4 On the User List page, click the Last Name link of the user.

5 On the User Detail page, click New Inventory Period.

The start date for the inventory period defaults to the current date.

NOTE: Oracle CRM On Demand does not display a message to confirm that the inventory period has been created for the user, and the User Detail page remains open. If you want to verify that the inventory period has been created, click the Inventory Period tab, and view the list of recently modified inventory periods.

Deactivating Users

You cannot delete a user. Instead, you need to make the user inactive. You do not need licences for inactive users.

Before you begin. To perform this procedure, your role must include the Manage Users privilege.

To deactivate a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user you want to remove from the system.
5. On the User Detail page, click the Edit button.
6. On the User Edit page, in the Key User Information section, select Inactive in the Status field.
7. Save the record.

Partner Self Administration

Company administrators can set up one or more users in a partner organisation as partner administrators in Oracle CRM On Demand. Partner administrators can perform a limited set of user management task, such as setting up members of their organisation as users in Oracle CRM On Demand, editing those user records, and resetting passwords or changing user IDs for those users. Partner administrators manage their users in the partner self-administration pages in Oracle CRM On Demand.

Access to the partner self-administration pages is controlled by the Manage Users within the Partner Organisation privilege.

NOTE: Company administrators grant the Manage Users within the Partner Organisation privilege to members of partner organisations. This privilege is not given to users in the brand owner company.

For information about setting up partner administrators, see Process of Setting Up Partner Administrators (Administrator) (on page 296). For information about managing users in the partner self-administration pages, see Managing Users in Your Partner Organisation (Partners) (on page 297).

Process of Setting Up Partner Administrators (Administrator)

The privilege that controls access to the partner self-administration pages is the Manage Users within the Partner Organisation. This privilege allows partner administrators to work with user records for members of their own partner organisation only. Partner administrators do not require and must not be granted the Manage Users privilege, because that privilege allows the partner administrator to see and edit user records for users outside his or her partner organisation.

For security reasons, company administrators also determine which roles partner administrators can give to users in their partner organisation. To do this, you associate roles with the partner organisation record. Then, when a partner administrator sets up a user, only the roles that you have associated with the partner organisation are available to be given to the user. Limiting the roles that partner administrators can grant to users enables you to ensure that partner administrators cannot give their users inappropriate privileges or access to data that the users are not supposed to see.

NOTE: Associating roles with a partner record limits the choice of roles that partner administrators can give to their users. It does not limit the choice of roles that company administrators in the brand owner company can assign to the users in the partner organisation.

To set up a partner administrator, perform the following tasks:

1. In the partner administrator's user role, grant the Manage Users within the Partner Organisation privilege.

   For information about granting privileges to roles, see Adding Roles (on page 309).

   NOTE: You can create a new role for partner administrators, or you can edit an appropriate existing role. You can also create different roles for partner administrators in the various partner organisations.

2. (Optional) Create a customised Partner Admin page layout for User record type, and assign it to the user's role.

   For information about creating customised page layouts, see Customising Static Page Layouts (on page 165). For information about assigning page layouts to roles, see Adding Roles (on page 309).

3. (Optional) If you want to create specific roles for users in the partner organisation, set up the roles.

   For information about setting up roles, see Role Management (on page 302) and Adding Roles (on page 309).

4. In the Partner Roles related information section on the partner organisation record, add the roles that the partner administrator can grant to the users in the partner organisation.

   For more information about linking records, see Linking Records to Your Selected Record.

5. If the role that you created or edited for the partner administrator is not already assigned to the user who is to act as the partner administrator, assign the role to the user.

   For more information about assigning roles to users, see Setting Up Users (on page 271).

Managing Users in Your Partner Organisation (Partners)

Before you begin. To manage users in your partner organisation, you must have the Manage Users within the Partner Organisation privilege in your role.

You manage users in your organisation in the partner self-administration pages in Oracle CRM On Demand. You access the partner self-administration pages from the global Admin link, which is available on every page in Oracle CRM On Demand.

To manage users in your partner organisation, do the following:

- Setting Up Users (Partners) (on page 298)
- Changing a User's User ID (Partners) (on page 300)
- Resetting a User's Password (Partners) (on page 301)
- Deactivating Users (Partners) (on page 301)

NOTE: Your Oracle CRM On Demand administrator might set up the audit trail for changes that are made to user records through the partner self-administration pages. If the audit trail is set up, then you can view the

details of the changes that are made to the audited fields in the Audit Trail related information section in the User Detail page.

Related Topics

See the following topics for related information about user management:

- User Fields (on page 273)
- Viewing Audit Trails for Records

Setting Up Users (Partners)

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organisation privilege in your role.

When setting up a user, the following fields determine what the user can access, view, and do. You must use them correctly.

- **Status field.** When you first set up a user, you can allow the user to access Oracle CRM On Demand immediately by setting the user's status to Active and prompting Oracle CRM On Demand to send the necessary sign-in information to the user when you save the user record.

  Alternatively, if you do not want the user to access Oracle CRM On Demand until later, you can set up the user record and set the user's status to Inactive. When you later want to allow the user to access Oracle CRM On Demand, you change the status of the user to Active, and use the reset password functionality to send the necessary sign-in information to the user by email.

- **Reports To field or Reports To (Alias) field.** The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as in the reports for managers and executives. The page where you set up users can contain either the Reports To field or the Reports To (Alias) field but must not contain both of these fields. For more information about the Reports To and Reports To (Alias) fields, see About the Reports To and Reports To (Alias) Fields on User Records (on page 285).

  TIP: Enter users who are at the top of the reporting hierarchy first.

- **Role field.** The user's role determines the user's access to tabs, features, records, and page layouts.

  NOTE: The company administrator determines which roles you can assign to users in your partner organisation.

When you create a user in your partner organisation, the Partner Organisation field on the user record is automatically populated with the name of your partner organisation, and you cannot change it.

About Sign-In Information for New Users

To sign in to Oracle CRM On Demand, a new user must have a temporary URL for Oracle CRM On Demand and a temporary password. You can prompt Oracle CRM On Demand to send the sign-in information to the user at the time that you create the user account, or you can do it later, as follows:

- If you want to send the sign-in information at the time that you set up the user account, select the Email Password When I Click Save check box on the user record before you save the user record for the first time.

You must select the check box before you save the record for the first time if you want the information to be sent to the user immediately. The sign-in information is sent to the user by email, in two parts:

- The first email contains a temporary URL.
- The second email contains a temporary password and details of the user's sign-in ID.

- If you want to send the sign-in information to the user later, do not select the Email Temporary Password When I Click Save check box when you create the user record.

  Later, when you want to send the sign-in information to the user, you can prompt Oracle CRM On Demand to send the information by clicking the Reset Password button on the user record. When you click the Reset Password button, the sign-in information is sent to the user by email, in two parts:

  - The first email contains a temporary URL.
  - The second email contains a temporary password.

  In this case, the email does not include details of the user's sign-in ID.

About Deleting Users

You cannot delete users. When an employee leaves your company, change the status of that user to Inactive.

The following procedure describes how to set up a member of your organisation as a user in Oracle CRM On Demand.

To set up a user

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organisation.
3. On the User List page, perform one of the following:
   - To add a new user, click New User.
   - To edit a user's information, click the user's last name and on the User Detail page, click the Edit button.
4. On the User Edit page, complete the required information.

   For more information, see User Fields (on page 273).
5. Save the record.

TIP: You can limit the user records that you see by creating filtered lists. For information on filtered lists, see Working with Lists.

Any list of user records that you open shows only the users who meet the criteria in the list filter and who are members of your partner organisation. The following procedure describes how to open a filtered list of users.

To open a filtered list of users

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organisation.
3. On the User List page, select an option from the drop-down list.

Changing a User's User ID (Partners)

The following procedure describes how to change the user ID for a user in your partner organisation.

The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:

- Asterisk (*)
- Backslash (\)
- Number sign (#)
- Question mark (?)
- Slash (/)
- Tilde (~)

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organisation privilege in your role.

To change a user's user ID

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organisation.
3. On the User List page, click the Last Name link of the user.
4. On the User Detail page, click Edit.
5. On the User Edit page, edit the User ID field.
6. Save the record.

Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the User ID field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 19).

The user can sign in to Oracle CRM On Demand by using the new user ID and the user's existing password.

Resetting a User's Password (Partners)

In Oracle CRM On Demand, users must answer a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they are locked out and want immediate access, you can reset their password.

Before you begin. To perform this procedure, your role must include the Manage Users within the Partner Organisation privilege and the Manage Company - Reset All Passwords privilege. In addition, the role of the user whose password you want to change must include the Reset Personal Password privilege.

NOTE: This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before sending an email with the temporary password.

The following procedure describes how to reset the password for a user in your partner organisation.

To reset a user's password

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organisation.
3. On the User List page, click the Last Name link for the user whose password you want to reset.
4. On the User Detail page, on the title bar, click the Reset Password button.

   The user's existing password is replaced with a new temporary password. The new temporary password is sent to the user by email.

   NOTE: This event is recorded in the Sign In History section on the User Detail page.

Deactivating Users (Partners)

You cannot delete a user. Instead, you must make the user inactive. Inactive users do not require a license. The following procedure describes how to deactivate a user in your partner organisation.

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organisation privilege in your role.

To deactivate a user

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organisation.
3. On the User List page, click the Last Name link for the user you want to remove from the system.
4. On the User Detail page, click the Edit button.

5 On the User Edit page, in the Key User Information section, select Inactive in the Status field.

6 Save the record.

Role Management

In Oracle CRM On Demand, you manage roles in the Role List page and in the Role Management Wizard. You access the Role List page and the Role Management Wizard from the global Admin link, which is available on every page in Oracle CRM On Demand.

A *role* in Oracle CRM On Demand is similar to a business function that a user performs within an organisation, such as a sales executive function or a service manager function. Within your organisation, 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 defining the features in Oracle CRM On Demand that a user has the privileges to use, the set of permissions the user is given to work with protected information and the user interface settings that display information.

NOTE: Users can be employees or employees of a partner organisation. Users can also be external systems that access Oracle CRM On Demand.

The parameters defined by a role include:

- Privileges
- Access to record types
- Access profiles for the role
- User interface settings, which include the following:
  - Tab settings
  - Page layouts
  - Search layouts
  - Homepage layouts

Each user has one assigned role. The same role can be assigned to multiple users. Roles do not have a hierarchy.

Related Topics

See the following topics for related information:

- Guidelines for Setting Up Roles (on page 303)
- Working with the Role List Page (on page 304)
- About Record Type Access in Roles (on page 305)
- About Access Profiles in Roles (on page 319)
- About Privileges in Roles (on page 307)
- About IP Address Restrictions for Roles (on page 308)

- Adding Roles (on page 309)

Guidelines for Setting Up Roles

Oracle CRM On Demand provides a set of prebuilt roles that you can use as your starting point for setting up roles for your company. The User and Role Set-up Template contains information about the prebuilt roles, listing their record access, privileges, and default tab access. For information about finding the User and Role Set-up templates, see Using Administrator Templates During Set-up (see "Using Administrator Templates During Setup" on page 16).

As an example of the type of role that you can set up in Oracle CRM On Demand, your company might require two distinct sales forces: the Install Base Account Management sales force and the New Business sales force. Field sales representatives in the Install Base Account Management sales force track account information about their customer deployments. Field sales representatives in the New Business sales force track account information that profiles the purchasing requirements of their prospect account. Although these two job duties are similar, the type of information most relevant to support their daily processes is different. In this example, you can set up two roles:

- The Install Base Field Sales Reps role
- The New Business Field Sales Reps role

You can base each of these roles on the prebuilt Field Sales Rep role, and tailor the new roles by adding different page layouts to support the unique business requirements of the two sales forces.

You can continue to change and add role definitions as required, for example, as a result of organisational change, or the acquisition of another company. If the organisational structure of your company changes, the business functions of one or more employees can also change. If your company acquires another company, you might have to assimilate additional employees as users in Oracle CRM On Demand.

When setting up roles, follow these guidelines:

- Determine how each employee or group of employees will use Oracle CRM On Demand.

  Examine the job functions of your employees to determine the following:

  - What tasks they must complete and which records they require access to
  - What kind of access they require to each type of record
  - If there are records or tabs that they must not be able to access

  The following table shows some examples of access types.

Access Type	Example
Feature access	The Inside Sales Rep role provides access to the Convert button on the Lead Detail page.
Record access	The Executive role provides edit access to all opportunity records regardless of the owner.
Tab access	By default, users who have the Sales and Marketing Manager role can access the Accounts and Opportunities tabs, but cannot access the Service Requests and Solutions tabs.

- Review the characteristics of each of the prebuilt roles to determine if these roles meet the needs of your employees.

  The names of the prebuilt roles do not necessarily match your company's job titles. You must match job functions and tasks to the roles, not job titles.

- Set up your roles as follows:

  - If a prebuilt role is close to what you want for an employee group, create a new role by copying the prebuilt role, giving the copy a new name, and then editing the copy to meet your requirements.
  - If no prebuilt role is close to what you require, create a new role to match your requirements.

  TIP: Use the User and Role Set-up Template to help you document the role requirements of your employee groups. Then, refer to the completed template when you create or edit roles and set up users in Oracle CRM On Demand.

Related Topics

See the following topics for related information:

- Role Management (on page 302)
- Working with the Role List Page (on page 304)
- About Record Type Access in Roles (on page 305)
- About Access Profiles in Roles (on page 319)
- About Privileges in Roles (on page 307)
- Adding Roles (on page 309)

Working with the Role List Page

On the Role List page, you can perform the actions in the following table.

To do this	Follow these steps
Add a new role	In the title bar of the Role List page, click New Role. The Role Management Wizard opens. For more information about using the Role Management Wizard, see Adding Roles (on page 309).
Add a new role by copying an existing role	In the record-level menu beside the role name, select Copy. The Role Management Wizard opens. For more information about using the Role Management Wizard, see Adding Roles (on page 309).
Delete a role	In the record-level menu beside the role name, select Delete, then confirm that you want to delete the role. **NOTE:** You cannot delete the Administrator role. When you delete a role, all users who have that role assigned

To do this	Follow these steps
	to them continue to have the role until you assign a different role to them. However, after you delete a role, you cannot assign that role to any user.
Select a language for viewing the list of roles	In the title bar of the Role List page, in the Translation Language field, select the language in which you want to view the list of roles. You can view the list in any of the languages that are supported for your company in Oracle CRM On Demand. **NOTE:** If an existing role does not have a translated role name, the name of the role is not translated and appears in brackets.

If the Alpha Search controls are available, then you can use Alpha Search to filter the list of roles. For more information about Alpha Search, see Filtering Lists.

The following table describes some of the fields that are displayed on the Role List page. The fields described in the table are read-only on the Role List page, and you cannot use them to sort or filter the list of roles.

Field	Description
Overridden Company Password Policy	This check box is selected if the Expire User Passwords In field on the role is populated. If the Expire User Passwords In field is populated, then for the users who have this role, the password expiry period for the role overrides the password expiry period for the company.
Additional IP Restrictions	This check box is selected if IP restrictions are defined on the role.

Related Topics

See the following topics for related information:

- Role Management (on page 302)
- Guidelines for Setting Up Roles (on page 303)
- About Record Type Access in Roles (on page 305)
- About Access Profiles in Roles (on page 319)
- About Privileges in Roles (on page 307)
- About IP Address Restrictions for Roles (on page 308)
- Adding Roles (on page 309)

About Record Type Access in Roles

You control access to primary record types for a role in step 2 of the Role Management Wizard. For more information about adding roles, see Adding Roles (on page 309).

A primary record type is a record type that can be used as an independent record type. Most, but not all, of the primary record types can appear as tabs in Oracle CRM On Demand. However, there are some primary record types that cannot appear as tabs. For example, the Book record type is a primary record type (that is, book records can be created as independent records). However, the Book record type cannot appear as a tab. Record types that are not primary record types cannot appear as tabs.

With some exceptions, the primary record types that meet the following criteria are listed in step 2 of the Role Management Wizard:

- Your company is licensed to use the record type.
- Your role has the appropriate privilege to access the record type.

The exceptions are record types that are used for administrative purposes only, such as the company profile, user records, workflow rules, and so on. Access to such record types is controlled through privileges only.

For each primary record type that is listed in step 2 of the wizard, access to the record type for the role is controlled through three settings:

- **Has Access.** When the Has Access check box in step 2 of the Role Management Wizard is selected for a primary record type on a role, users who have the role can access records of that record type. If the Has Access check box is deselected for a record type on a role, users who have the role are denied all forms of access to the record type. For example, if the Has Access check box is deselected for the Account record type on a role, all forms of access to the Account record type, including related applets, search capabilities, and other access to the Account record type, are denied to users who have the role. Then the following can occur:
  - If a user who does not have access to the Account record type attempts to associate an opportunity with an account record, the operation fails.
  - If a user who does not have access to the Account record type sees an opportunity that is already linked to an account, the user is not able to view any details of the linked account record.

  NOTE: Denying access to a record type (by not selecting the Has Access check box for the record type in the Role Management Wizard) can prevent a user from being able to create a record of another record type. For example, if you deny access to a record type that a user must access to create a record based on another record type, you can prevent a user who has the role from being able to create that record.
- **Can Create.** When the Can Create check box in step 2 of the Role Management Wizard is selected for a record type on a role, users who have the role can create records of that record type.

  If the Can Create check box for a primary record type is deselected, users who have the role do not have the ability to create a record of that primary record type.

  NOTE: The permission to create records of a primary record type is controlled by this setting. It is not controlled through access profiles. Access profiles control access to existing data, so primary records must exist before access profiles can control access to those records.
- **Can Read All Records.** When the Can Read All Records check box in step 2 of the Role Management Wizard is selected for a primary record type on a role, users who have the role can see all records of that record type. If the Can Read All Records check box is deselected for a primary record type, as a general rule, users who have the role can see records of that record type only if they are authorised to see the record. Other access-control components can influence the visibility to records, such as books, teams, groups, and the management hierarchy. Users can gain visibility to records that they do not own through those access-control components. However, if no other access-control component authorises visibility to

the records, and the Can Read All Records check box is deselected, then the user sees only the records that the user owns.

Related Topics

See the following topics for related information:

- Role Management (on page 302)
- Guidelines for Setting Up Roles (on page 303)
- Working with the Role List Page (on page 304)
- About Access Profiles in Roles (on page 319)
- About Privileges in Roles (on page 307)
- Adding Roles (on page 309)

About Privileges in Roles

You grant or revoke privileges for a role in step 4 of the Role Management Wizard. For more information about adding roles, see Adding Roles (on page 309).

Privileges control the features that your company is licensed to use in Oracle CRM On Demand. When your company is first set up to use Oracle CRM On Demand, the Administrator role is given all the privileges for all the licensed features. Every time a user interacts with Oracle CRM On Demand, Oracle CRM On Demand reviews the set of privileges assigned to that user's role to determine whether the user has the necessary privileges to perform certain functions and to access certain record types. If a privilege that was previously granted to a role is later revoked, any user who has the role loses the ability to use the feature. When a privilege is revoked, any existing data and configuration information that were put in place by a user who had the privilege are not lost.

In the Role Management Wizard, privileges are organised in categories. Each category represents the group of privileges that comprises a piece of functionality in Oracle CRM On Demand. For example, *Admin: Users and Access Controls* is a category of privilege that controls all functional areas of User Management and Access Control.

Each privilege relates to an individual functional area within a category of privileges. For example, Manage Books is a privilege that is required if a user who has the role wants to create, update, edit, and delete custom books and subbooks, and manage associated members. Each privilege also exposes control fields and other capabilities unique to the feature. To determine which privileges are required to allow users to use a feature, see the online help.

NOTE: Granting a privilege to a role is not enough to grant all access rights to allow a user to use the functionality. When you grant a privilege, the necessary record types and functional details required for the feature are exposed in the role. For example, when the Manage Books privilege is assigned to a role, a user who has the role sees the Books record type in step 2 of the Role Management Wizard, and also in the Access Profile Wizard. However, to give the user the necessary rights to work with book records, you must also configure the necessary levels of access in step 2 (Record Type Access) of the Role Management Wizard for the user's role and in the access profiles for the role.

Related Topics

See the following topics for related information:

- Role Management (on page 302)
- Guidelines for Setting Up Roles (on page 303)
- Working with the Role List Page (on page 304)
- About Record Type Access in Roles (on page 305)
- About Access Profiles in Roles (on page 319)
- Adding Roles (on page 309)

About IP Address Restrictions for Roles

You can specify IP address restrictions at role level. This functionality enables you to restrict access to Oracle CRM On Demand so that users who have a certain role can sign in to Oracle CRM On Demand only from computers that have IP addresses within the ranges that are specified for that role. You can also specify IP address restrictions at company level, for more information, see Restricting Use to IP Addresses (on page 58). A user is allowed to sign in only if the IP address of the user's computer is within the ranges specified at role level and at company level.

To allow you to restrict access to Oracle CRM On Demand to specific ranges of IP addresses at company level, role level or both levels, the IP Address Restrictions Enabled check box on the company profile must be selected. If this check box is not already selected, then contact Oracle CRM On Demand Customer Care and ask them to select the check box.

You can restrict access to specific ranges of IP addresses at role level even if you do not restrict access to specific ranges of IP addresses at company level. However, if you restrict access to specific ranges of IP addresses at both company level and role level, then the ranges of IP addresses that you allow for a user role must fall within the ranges of the IP addresses that you allow at company level. If you restrict access for a user role, then users who have that role can sign in to Oracle CRM On Demand only if the IP addresses of their computers are within the ranges of IP addresses that are allowed for the user role and are also within the ranges of IP addresses that are allowed at company level.

The following table shows an example of how the IP address restrictions at company level work with the IP address restrictions at role level. In all cases shown in this table, the IP Address Restrictions Enabled check box on the company profile is selected, and no IP address restrictions are specified in any role other than the Field Sales Rep role.

Allowed IP Addresses at Company Level	Allowed IP Addresses for Field Sales Rep Role	IP Addresses Allowed for Users	Notes
No IP addresses specified	203.0.113.254	■ IP address 203.0.113.254 is allowed for users who have the Field Sales Rep role. ■ Any IP address is allowed for users who do not have the	None.

Allowed IP Addresses at Company Level	Allowed IP Addresses for Field Sales Rep Role	IP Addresses Allowed for Users	Notes
		Field Sales Rep role.	
198.51.100.1 through 198.51.100.254	No IP addresses specified	IP addresses 198.51.100.1 through 198.51.100.254 are allowed for all users.	None.
198.51.100.1 through 198.51.100.254	203.0.113.254	■ No IP addresses are allowed for users who have the Field Sales Rep role. ■ IP addresses 198.51.100.1 through 198.51.100.254 are allowed for users who do not have the Field Sales Rep role.	The IP address 203.0.113.254 is not within the range of addresses allowed at company level.
192.0.2.1 through 192.0.2.254	192.0.2.1.50	■ IP address 192.0.2.1.50 is allowed for users who have the Field Sales Rep role. ■ IP addresses 192.0.2.1 through 192.0.2.254 are allowed for users who do not have the Field Sales Rep role.	The IP address 192.0.2.1.50 is within the range of addresses allowed at company level.
No IP addresses specified	No IP addresses specified	All users including users who have the Field Sales Rep role can access Oracle CRM On Demand from any IP address.	None.

For information on restricting access to Oracle CRM On Demand to specific ranges of IP addresses at role level, see Adding Roles (on page 309).

Adding Roles

You can add a role to Oracle CRM On Demand by doing the following:

- Creating a new role
- Copying an existing role, renaming the copy, and then editing the privileges and access rights of the copy

Copying roles is useful if you want to have similar roles, but you want users to see different page layouts. For example, your North American and EMEA executives might want to view opportunity information in different ways, requiring different fields and page layouts for each set of users. To set up this configuration, create two roles that are based on the default Executive role, and name your new roles, *Exec - North America* and *Exec - EMEA.* When you copy the Executive role, the access privileges of the original role are retained for the new role, and you must change only the page layouts so that users to whom you give the new role are presented with the views and fields relevant to their work.

NOTE: You must create the page layouts that you want to associate with the role. For information about creating page layouts, see Record Type Application Customisation Page (on page 104).

TIP: Consider setting up a test user for each role. Then, activate the test user, and make sure the configurations are set up correctly. Do not activate other users until you have completed all user set-up activities, including access rights, role settings, reporting and data-sharing hierarchies, workflow rules, and any other business process customisation. Deactivate test users when the testing is complete.

Before you begin. Do the following:

- Make sure your role has the Manage Roles and Access privilege.
- If you want to update the Expire User Passwords In field in a role, then make sure your role has the Manage Company privilege.
- Read the guidelines for setting up for roles, see Guidelines for Setting Up Roles (on page 303).

NOTE: Oracle CRM On Demand generates audit records of all changes to roles. If your user role includes the Access Master Audit Trail and Admin Configuration Audit privilege, then you can view the audit trail of the changes to roles. For more information about viewing the audit trail, see Reviewing the Audit Trail for Administration Configuration Changes (on page 81).

The following procedure describes how to add a role.

To add a role

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. In the Role Management section, click Role Management.
4. In the Role List page, in the Translation Language field, choose your company's primary language.
5. Perform one of the following:
   - To create a new role by copying an existing role, click Copy on the role that you want to copy.
   - To create a new role that is not based on an existing role, click New Role in the title bar of the page.

   The Role Management wizard appears, to lead you through the process. Each step in the Role Management Wizard controls certain settings for the role. All the role settings together determine the access rights for users who have the role.
6. In Step 1, Role Information, provide a name and description, and complete the remaining fields as needed. The remaining fields are described in the following table.

Field	Description
Mark for Translation	The Mark for Translation check box is effective only in both of the following circumstances: ■ When the name of an existing role is being changed ■ The existing role name has already been translated into one or more additional languages In these circumstances, you can use the Mark for Translation check box to indicate whether the translated role name is to be replaced by the new name, or is to remain unchanged. Depending on the setting of the Mark for Translation check box, the role name is displayed as follows: ■ If you select the Mark for Translation check box, then the new name is displayed in the language in which it was entered, regardless of the language used for viewing the list of roles. When the list of roles is viewed in the language in which the new name was entered, the name is displayed in black font. However, when the list of roles is viewed in any other language, the name is displayed in blue font within brackets. ■ If you do not select the Mark for Translation check box, the new name appears when the list of roles is viewed in the language in which the new name was entered. However, when the list of roles is viewed in any other language, the original translated role name still appears. The Mark for Translation check box does not have any effect when a new role is added. When a new role is added, the new name automatically appears in the list of roles in all languages. When the list of roles is viewed in the language in which the new name was entered, the name of the new role is displayed in black font. When the list of roles is viewed in any other language, the name of the new role is displayed in blue font within brackets.
Default Sales Process	(Optional) To set the default sales process for new opportunities created by users who are assigned this role, choose an option in the Default Sales Process field. For more information about this option, see Setting Up Sales Processes, Categories and Coaches (on page 528).
Default Theme	(Optional) 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. Users can override this setting when they edit their personal preferences. If a default theme is not selected in the user's record, then the default theme that is selected for the user's role is used. If a default theme is not selected in either the user's record or the user's role, then the default theme that is specified for the company is used. For more information on creating themes, see Creating New Themes (on page 253).
Tablet Theme	(Optional) The theme that is used 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

Field	Description
	device is detected by Oracle CRM On Demand. Users can override this setting when they edit their personal preferences. If a tablet theme is not selected in the user's record, then the tablet theme that is selected for the user's role is used. If a tablet theme is not selected in either the user's record or the user's role, then the tablet theme that is specified for the company is used. If a tablet theme is not specified at any level, then the default theme is used.
Action Bar and Global Header Layouts	By default, the standard layout is used for the Action bar and the global header for all roles. You can assign a different layout for the role. If the user uses a classic theme, then the Action bar and global header layout for the role determines which sections are available to the user in the Action bar layout. If the user uses a modern theme, then the Action bar and global header layout for the role determines which sections are available to the user in the Action bar and also determines which sections are available to the user in the global header.
Related Information Format	(Optional) To set a format for related information sections on record Detail pages for the role, choose either Lists or Tabs. This setting determines if the related information sections on record Detail pages are shown as lists or as tabs. This setting can also be set on each user's record, and users whose role has the Personalise Related Information Display Format privilege can set the Related Information Format option in their personal profile. If the Related Information Format field in a user's record is blank, then the setting for the user's role is used; and if the Related Information Format field on the user's role is blank, then the setting for the company is used.
Lead Conversion Layout	(Optional) To set a lead conversion layout (for the Convert Lead page) for the users assigned this role, choose a layout in the Lead Conversion Layout field. If you do not choose a layout for the role, the default layout for the company is used for the role. For information about creating lead conversion layouts, see Creating Lead Conversion Layouts (on page 518).
Expire User Passwords In	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. This field is blank by default. If you leave this field blank for the role, then the password expiry period that is defined for the company applies to the users who have this role. For information about defining password controls for your company, see Defining Your Company's Password Controls (on page 49). **NOTE:** If your role does not have the Manage Company privilege, then this field is read-only.

Field	Description
IP Address Restrictions Enabled	(Read-only) If this check box is selected, then you can specify that users who have this role can access Oracle CRM On Demand from certain IP addresses only. You can specify the IP addresses in the Allowed IP Addresses field.
Allowed IP Addresses	If you want to allow the users who have this role to access Oracle CRM On Demand from certain IP addresses only, then enter the valid addresses or ranges of addresses for the role in this field. If you do not enter any addresses in this field, then users who have this role can access Oracle CRM On Demand from any IP address that is allowed at company level. For more information about how IP address restrictions work, see About IP Address Restrictions for Roles (on page 308). Separate the IP addresses and IP address ranges with commas. The following example shows how to enter several addresses: 192.0.2.1, 192.0.2.10, 192.0.2.15 Use a hyphen (-) to denote an address range, as shown in the following example: 192.0.2.1-3, 192.0.2.50-100, 192.0.2.200-254 **NOTE:** If you restrict the IP addresses for your own user role, and if your current IP address does not come within the range of addresses that you allow for your user role, then you cannot save the changes to the role. This feature prevents you from accidentally locking yourself out of Oracle CRM On Demand.
Maximum Number of Records per List Export	To restrict the number of records that users who have this role can export at one time when exporting a list of records, enter the appropriate value in this field. For example, if you want to restrict users to exporting a maximum of 100 records in a list at one time, then enter 100 in this field. The restriction applies only in the case of records exported 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. This field is blank by default, that is, no restriction is applied.

1 In Step 2, Record Type Access, for each record type, select the check box for each access level that you want to grant to the role.

You can select one or more of the following access levels for each record type:

- Has Access
- Can Create
- Can Read All Records

For more information about these access levels, see About Record Type Access in Roles (on page 305).

CAUTION: Denying access to a record type (by not selecting the Has Access check box for the record type in the Role Management Wizard) can prevent a user from being able to create a record of another record type. For example, if you deny access to a record type that a user must access to create a record based on another record type, you can prevent a user who has the role from being able to create that record.

NOTE: To convert leads or deal registrations, users must have the appropriate access level settings for certain record types. For more information about the access levels that are required for converting leads, see Access Profile and Role Settings for Converting Leads. For information about the access levels that are required for converting deal registrations, see Access Profile and Role Settings for Converting Deal Registrations.

TIP: When you make changes to the access levels for a role, after you save your changes, users assigned the role must sign out and sign in again for the changes in their role to take effect.

2 In Step 3 Access Profiles, choose the access profiles to be assigned to this role:

For more information about access profiles in roles, see About Access Profiles in Roles (on page 319).

3 In Step 4, Privileges, select the Assign check box for each privilege that you want to grant to the role, or deselect the Assign check box for any privilege you want to revoke from the role.

Privileges are organised alphabetically by category.

CAUTION: In some cases, if the Assign check box for a privilege is deselected on the Administrator role, then the privilege is removed from Oracle CRM On Demand, and the company administrator cannot grant that privilege to any other role. If this problem occurs, contact Oracle CRM On Demand Customer Care to restore the privilege.

For more information about privileges in roles, see About Privileges in Roles (on page 307).

4 In Step 5, Tab Access and Order, move the tabs to the appropriate section of the page, then click the up and down arrows in the Selected Tabs section to define the order in which the tabs that the user sees by default are displayed.

The Not Available Tabs section lists the record-type tabs and custom Web tabs that you can make available to the role. The list of record types that appear in this section is determined by Oracle CRM On Demand. Most of the record types that are listed in step 2 of the Role Management Wizard also appear in this list. Other record types, such as Books, do not appear in this list because they cannot be displayed as tabs. The tabs shown in the Not Available Tabs section are not available to users who have the role.

To make tabs available or visible to users who have this role, do the following:

- Move tabs that you want users to see by default to the Selected Tabs section. This section lists the record-type tabs and custom Web tabs that are visible by default to any user who has the role, the first time the user signs in with the role. Use the up and down arrows to determine the order in which the tabs are initially displayed. Each user who has the role can customise his or her settings, so that tabs are no longer displayed by default or are displayed in a different order. For more information about how users can manage their personal settings, see Personalising Your Application.
- Move tabs that you do not want users to see by default, but which the users can make visible for themselves, to the Available Tabs section. This section lists the record-type tabs and custom Web tabs that are available to the role, but that are not displayed by default. That is, the tabs listed in this section are not displayed to the users until the users make the tabs visible for themselves in their personal layout (available from the My Set-up link). Each user who has the role can personalise his or

her settings so that the available tabs are displayed by default. Each user can also specify the order in which all of the tabs are displayed.

- Leave tabs that you want hidden from users in the Not Available Tabs section.

NOTE: Moving a tab from the Not Available Tabs section to the Available Tabs or Selected Tabs section makes the tab available to the user only if the Has Access check box is selected for the record type in step 2 (Record Type Access) of the Role Management Wizard.

TIP: You can move a range of tabs at the same time by selecting the top one, holding down the Shift key, and clicking the last one in the range. Then click the right or left arrow.

5 In Step 6, Page Layout Assignment, for each record type, choose if the Page View Type is static or dynamic, then select from the list of page layouts available for that view type.

Page layouts determine the fields and sections users see on the Create, Edit, and Detail pages for the various record types. Oracle CRM On Demand comes with a standard page layout for each record type. The standard page layouts, which cannot be deleted, are static page layouts. So, the Static option is always available in the Page View Type field. The Dynamic option is available only if there are dynamic page layouts available for the record type. Company administrators can create additional, customised, static page layouts or dynamic page layouts for record types.

For each record type, the standard page layout and any page layouts that are created for the record type are available for assignment to the role. For more information about creating static and dynamic page layouts, see Record Type Application Customisation Page (on page 104).

The default page layout for a record type is the standard, static page layout for that record type.

NOTE: The list of record types that appears in step 6 of the Role Management Wizard is determined by Oracle CRM On Demand. You might see record types such as User Admin and User Owner, which do not appear as tabs in Oracle CRM On Demand.

6 If you want to configure the record indicator settings for the related information sections for a record type, then in Step 6, Page Layout Assignment, do the following:

a In the row for that record type, click the Configure link in the Manage Record Indicator column to open the page where you configure the record indicator settings.

b Move each of the related information sections that you want to display the record indicators from the Available Related Information list to the Selected Related Information list.

NOTE: All of the related information sections that are supported for the record type and also support the record indicator functionality are available for you to select, including the related information sections that are not available in the Detail page layout that is currently selected for the role for that record type. The settings for the record indicators continue to apply to the record type for that role until you change the settings again. So, if you update the Detail page layout that is assigned to the role for a record type, then the record indicator settings apply to the updated layout. Similarly, if you later assign a different Detail page layout to the role, then the record indicator settings apply to the new page layout.

c When you finish configuring the record indicator settings for the record type, click Previous to return to the main page for Step 6 of the wizard.

d Repeat steps a through c of this procedure for each record type for which you want to configure the record indicator settings for this role.

NOTE: Users whose role includes the Personalise Detail Page - Records Indicator privilege can personalise the record indicator settings for the Detail page for a record type. A user's personalised settings for the record indicators override the settings at role level. However, you can remove all personalised page layouts for a record type for a role, including the personalised settings for the record indicators, by resetting the page layout to the default layout. Users whose role includes the Personalise Detail Page - Records Indicator privilege can also reset their own personalised record indicator settings for a record type to the default settings for that record type for the role. For information about resetting page layouts, see Resetting Personalised Page Layouts (on page 336). For information about the behaviour of the record indicators, see About the Record Indicators for Related Information Sections. For information about personalising the record indicator settings, see Managing Record Indicators for Related Information Sections.

7 In Step 7, Search Layout Assignment, for each record type, select from the list of available search layouts.

For each listed record type, the list of available layouts is shown in the Search Layout Name field. Search layouts determine the fields (standard fields and custom fields) that users can use when searching for records, and the fields that users see in search results pages. You can assign a search layout for most of the primary record types that are available to the role as tabs. You can also assign search layouts to other record types that are also searchable, such as Product and User. For more information on creating and modifying customised search layouts, see Managing Search Layouts (on page 195).

8 In Step 8, Homepage Layout Assignment, for each record type, select from the list of available homepage layouts.

For each listed record type, the standard Homepage layout and any Homepage layouts that you create for the record type are available for you to assign to the role. The list of record types includes all of the primary record types that are available as tabs for the role.

Homepage layouts determine what information users see on the Homepage for each record type. Oracle CRM On Demand comes with a default Homepage layout for each primary record type that can appear as a tab. You can create additional, customised Homepage layouts for record types. For more information about creating Homepage layouts, see Creating Record Homepage Layouts (on page 205).

9 (Optional) In Step 9, New Record Layout Assignment, for each record type, specify the layout that is to be used for the pages where users enter information for new records. The following table describes the fields in Step 9 of the Role Management wizard.

Field	Description
New Record Layout Name	Administrators can set up custom layouts for the pages where users enter information for new records. If any such custom layouts have been created for the record type, then you can select a custom layout from the list in the New Record Layout Name field. By default, no value is selected in this field. If you leave this field blank, then the layout that is assigned to the role for the Detail page in Step 6 of the Role Management wizard is also used for the page where users enter information for new records unless the user has personalised the field layout for the record type, in which case the personalised layout is used.

Field	Description
Quick Create Links Only	Use this check box to specify when the custom layout that you select in the New Record Layout Name field is to be used, as follows: ■ If this check box is deselected, then the custom layout that you select is used when a record is created from any area in Oracle CRM On Demand. ■ If this check box is selected, then the layout that you select is used only when a user creates a record through the Action bar or the global header. When a user creates a record from any other area in Oracle CRM On Demand, the layout for the Detail page for the role is used unless the user has personalised the field layout for the record type, in which case the personalised layout is used. **NOTE:** If you do not select a layout in the New Record Layout Name field, then the Quick Create Links Only check box is not applicable.

1 Click Finish.

Related Topics

See the following topics for related information:

- Role Management (on page 302)
- Guidelines for Setting Up Roles (on page 303)
- Working with the Role List Page (on page 304)
- About Record Type Access in Roles (on page 305)
- About Access Profiles in Roles (on page 319)
- About Privileges in Roles (on page 307)

Access Profile Management

In Oracle CRM On Demand, you manage access profiles in the Access Profiles List page and in the Access Profile Wizard. You access the access profile pages from the global Admin link, which is available on every page in Oracle CRM On Demand.

An *access profile* in Oracle CRM On Demand is a named collection of permissions on primary record types and related record types.

A *primary record type* is a record type that can be used as an independent record type. A *related record type* is a record type that must have a parent record.

Many primary record types can also be used as related record types. For example, Opportunities is a related record type. It is based on the Opportunity primary record type and is related to parent account records that are based on the Account record type.

A *permission* is the ability to read, create, update, or delete data on records that are instances of record types. Permissions are also referred to as access rights or access levels. For each record type, such as accounts, contacts, service requests, and so on, you can set up permissions for the record type itself. For some record types, you can also set up permissions for related record types.

You can set up many access profiles consisting of different permissions for primary record types and related record types. To grant these permissions to authenticated users (including external systems), you associate the access profiles with roles, books, teams, and groups.

Oracle CRM On Demand provides a set of predefined access profiles. The following are some of the standard access profiles:

- Edit
- Full
- ReadOnly
- Administrator Default Access Profile
- Administrator Owner Access Profile

Typically, access profiles are named to distinguish between default access profiles and owner access profiles. (In the list of predefined access profiles, there are pairs of access profiles with the terms *Default* and *Owner* in their names.) These terms help you to identify which access profiles to use in the access profile assignments on user roles, where an owner access profile and a default access profile must be assigned.

The Edit, Full, and Read-Only access profiles are generic access profiles that can be granted to any role, team, or book member. For example, you can assign the Full access profile to the Owner Access Profile of the Administrator role. In the standard application, the Full access profile gives a user who has the Administrator role the ability to create related records on top-level records, and to retrieve, update, or delete records of all primary record types and their related record types.

NOTE: Administrators can change the access settings on the default access profiles. So, the name of an access profile might not match the actual permissions that the access profile grants to a user.

You can use the predefined access profiles, edit the existing access profiles, and create custom access profiles to meet the requirements of your company. When creating a new access profile, you have the option of copying an existing access profile, giving it a new name, and then editing the copy to meet your requirements.

To view, create or revise access profiles at your company, your role must include the Manage Roles and Access privilege. It is recommended that only company administrators are given the privilege required to manage access profiles, because access profiles directly affect the security of protected data.

Related Topics

See the following topics for related information:

- About Access Profiles in Roles (on page 319)
- About Access Profiles in Teams, Groups, and Books (on page 320)
- About Access Propagation Through Team Inheritance (on page 321)
- Working with the Access Profile List Page (on page 323)
- About Access Levels for Primary Record Types (on page 324)
- About Access Levels for Related Record Types (on page 325)

- Process of Setting Up Access Profiles (on page 332)
- How Access Rights Are Determined (on page 390)

About Access Profiles in Roles

Each role in Oracle CRM On Demand has two access profile assignments:

- A default access profile assignment
- An owner access profile assignment

You can assign an access profile to multiple roles, and you can assign the same access profile to be both the default access profile and the owner access profile on a role. For example, you can assign the Full access profile (one of the predefined access profiles) as the default and owner access profiles for the Administrator role.

You assign access profiles to a role in step 3 of the Role Management Wizard. For more information about adding roles, see Adding Roles (on page 309).

Default Access Profile

The default access profile on a role controls the access rights of a user to records that are not owned by that user, but are visible to the user because the Can Read All Records option is selected for the relevant record type in the record-type access settings on the user's role.

If the Can Read All Records check box on the user's role is deselected for a record type, the user has no access to that record type through the role, and the default access profile on the user role is never used for that record type.

According to the naming convention for access profiles, access profiles that are set up to be assigned as default access profiles are named as follows:

role name Default Access Profile

where:

- *role name* is the name of the role where the access profile is to be used.

For example, the name *Administrator Default Access Profile* indicates that this access profile controls access rights to record types and their related record types for the Administrator role.

Owner Access Profile

The owner access profile on a role controls the access rights of a user to records that are owned by that user or owned by a subordinate of the user.

According to the naming convention for access profiles, access profiles that are set up to be assigned as owner access profiles are named as follows:

role name Owner Access Profile

where:

- *role name* is the name of the role where the access profile is to be used.

For example, the name *Service Manager Owner Access Profile* indicates that this access profile controls access rights to record types and their related record types for the Service Manager role.

Related Topics

See the following topics for related information about access profiles:

- Access Profile Management (on page 317)
- Process of Setting Up Access Profiles (on page 332)
- How Access Rights Are Determined (on page 390)

See the following topics for related information about roles:

- Role Management (on page 302)
- Guidelines for Setting Up Roles (on page 303)
- Working with the Role List Page (on page 304)
- About Record Type Access in Roles (on page 305)
- About Access Profiles in Roles (on page 319)
- About Privileges in Roles (on page 307)
- Adding Roles (on page 309)

About Access Profiles in Teams, Groups, and Books

Access profiles are used to give access rights to users who are members of teams or groups (through user books), and to users who are associated with custom books. (Access profiles are also assigned to roles, as described in About Access Profiles in Roles (on page 319).) Assigning access profiles to users for teams and books allows users to access records that they would not be able to access if they were restricted to the access rights provided by the access profiles assigned to their role.

NOTE: In Oracle CRM On Demand, a default book is assigned to each user and bears the user's name. When a record is assigned to a user, the record is assigned to the user's default book. Where a record is owned by a team, the team represents the set of default books of the users who are members of the team. When a user becomes a member of a team, the user book for that user is added to the set of user books that makes up the team. User books are automatically associated with records when the record owner is changed and when team membership is changed.

Groups are predefined teams that are supported for certain record types. When the owner of a record is a member of a group, other members of that group are automatically added to the team on that record. The group members are given full access to the record by default, and the access level cannot be changed.

Each user book in a team must be given an access profile that controls the user's access rights to the records that they can access through their membership of the team. You can make any access profile available for assignment to team membership by selecting the Grantable to Team Members check box on the access profile.

Similarly, each user associated with a custom book must be given an access profile that controls the user's access to records in that custom book. You can make any access profile available for assignment to a user's association with a book by selecting the Grantable to Book Users check box on the access profile.

For more information about user books and custom books, see Book Management (on page 338).

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Process of Setting Up Access Profiles (on page 332)
- How Access Rights Are Determined (on page 390)

About Access Propagation Through Team Inheritance

Team inheritance is the automatic addition of the members of an account team to the teams for the records that are linked to the account. Team inheritance is available as an option for contacts and opportunities that are related to a parent account. Team inheritance is not supported for any other type of team relationship.

NOTE: When a user becomes a member of a team, the user book for that user is added to the set of user books that makes up the team. Oracle CRM On Demand does not distinguish between users who are added to a team through the team inheritance feature, and users who are added to a team manually (that is, the user books that are added to a team through the team inheritance feature are treated the same as user books that are added to a team manually).

About Team Inheritance for the Contact Record Type

For the Contact record type, team inheritance is controlled by the Enable Parent Team Inheritance for Contact check box on the Company Profile page. If this check box is selected, then the teams on the contacts that are linked to a parent account inherit the members of the parent account team as follows:

- When a contact is related to a parent account:
  - Each account team member (including the account owner) becomes a member of the contact team, provided that an access profile is specified in the Contact Access field in the user record on the account team.
  - The owner of the account is granted the Full access profile for membership of the contact team by default, even if the Full access profile is deactivated.
- When a new member is added to an account team, the user's membership of the teams for the contacts that are related to the account is determined as follows:
  - If an access profile is specified in the Contact Access field in the user record on the account team, then the new member of the account team also becomes a member of the contact team for each contact related to the account. Also, the access profile for the user on the contact team for each related contact is updated to be the same as the access profile for the user on the account team.
  - If an access profile is not specified in the Contact Access field in the user record on the account team, then the new member of the account team is not added to the contact team for any of the contacts related to the account. If the user is already a member of the contact team for a contact that is related to the account, then the user is removed from the contact team of that contact.
- When an account owner is changed:

- The new owner becomes a member of the contact teams on all related contact records.
- The previous account owner remains a member of the contact teams to which the previous account owner was already added.

- When a user is removed from an account team, the user remains a member of the contact teams to which the user was added through team inheritance.

About Team Inheritance for the Opportunity Record Type

For the Opportunity record type, team inheritance is controlled by the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page. If this check box is selected, then the teams on the opportunities that are linked to a parent account inherit the members of the parent account team as follows:

- When an opportunity is related to a parent account:
  - Each account team member (including the account owner) becomes a member of the opportunity team, provided that an access profile is specified in the Opportunity Access field in the user record on the account team.
  - The owner of the account is granted the Full access profile for membership of the opportunity team, even if the Full access profile is deactivated.
- When a new member is added to an account team, the user's membership of the teams for the opportunities that are related to the account is determined as follows:
  - If an access profile is specified in the Opportunity Access field in the user record on the account team, then the new member of the account team also becomes a member of the opportunity team for each opportunity related to the account. Also, the access profile for the user on the opportunity team for each related opportunity is updated to be the same as the access profile for the user on the account team.
  - If an access profile is not specified in the Opportunity Access field in the user record on the account team, then the new member of the account team is not added to the opportunity team for any of the opportunities related to the account. If the user is already a member of the opportunity team for an opportunity that is related to the account, then the user is removed from the opportunity team of that opportunity.
- When an account owner is changed:
  - The new owner becomes a member of the opportunity teams for all related opportunity records.
  - The previous account owner remains a member of the opportunity teams to which the previous account owner was already added.
- When a user is removed from an account team, the user remains a member of the opportunity teams to which the user was added through team inheritance.

What Happens If Team Inheritance Is Disabled?

Team inheritance might grant too much access to the account team members who become members of the teams on related contact and opportunity records. If so, then you can disable team inheritance for the Contact record type, or the Opportunity record type, or both, by deselecting the relevant check boxes on the Company Profile page.

If team inheritance is disabled for the Contact record type, then membership of account and contact teams behaves as follows:

- The Contact Access field in the user records on account teams is not displayed.
- Users that are added as new members of an account team are not added to the contact teams on the contacts that are linked to the account.
- If team inheritance was previously enabled for the Contact record type, and if you disable it, then users who became members of teams through the team inheritance feature remain as members of those teams.

If team inheritance is disabled for the Opportunity record type, then membership of account and opportunity teams behaves as follows:

- The Opportunity Access field in the user records on account teams is not displayed.
- Users that are added as new members of an account team are not added to the opportunity teams on the opportunities that are linked to the account.
- If team inheritance was previously enabled for the Opportunity record type, and if you disable it, then users who became members of teams through the team inheritance feature remain as members of those teams.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Process of Setting Up Access Profiles (on page 332)
- How Access Rights Are Determined (on page 390)

Working with the Access Profile List Page

On the Access Profile List page, you can perform the actions in the following table.

To do this	Follow these steps
Add a new access profile	In the title bar of the Access Profile List page, click New. The Access Profile Wizard opens. For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 332).
Add a new access profile by copying an existing access profile	In the record-level menu beside the access profile name, select Copy. The Access Profile Wizard opens. For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 332).
Disable an access profile	Select the Disabled check box for the access profile. When you disable an access profile, it cannot be used in any new associations with roles, teams, or books. However, the disabled access profile continues to function as the access

To do this	Follow these steps
	profile where it has been associated previously with a role, team, or book until you assign a different access profile to the role, team, or book.
Select a language for viewing the list of access profiles	In the title bar of the Access Profile List page, in the Translation Language field, select the language in which you want to view the list of access profiles. You can view the list in any of the languages that are supported for your company in Oracle CRM On Demand. **NOTE:** If an existing access profile does not have a translated access profile name, the name of the access profile is not translated and appears in brackets.

If the Alpha Search controls are available, then you can use Alpha Search to filter the list of access profiles. For more information about Alpha Search, see Filtering Lists.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Process of Setting Up Access Profiles (on page 332)
- How Access Rights Are Determined (on page 390)

About Access Levels for Primary Record Types

You grant or revoke access rights to primary record types by setting the access levels in step 2 of the Access Profile Wizard. For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 332).

Access levels are the lowest level of permissions that can be granted for a record type. For each primary record type, you specify the access rights for any user who inherits this access profile through one or more of the access-control components (roles, reporting hierarchy, teams, and books). For example, when a user drills down on an opportunity from an opportunity list, the access rights that allow the user to see the opportunity details and to perform operations are controlled by the access level for the Opportunity primary record type in step 2 of the Access Profile Wizard.

The description in this section of the access levels for primary record types pertains to the functionality of the access levels as they operate individually. The records that a user can view and the operations that a user is allowed to perform on records are controlled by a combination of one or more access levels that are applied to the records through one or more access profiles.

Record types that are controlled through special privileges appear in all access profiles with the access level set by default. For primary record types, the default setting is Read-Only. You must change the default setting to give your users the access level that they require for the various record types.

The access level for each primary record type can be set to one of the following:

- **Read-Only.** The Read-Only access level prevents the user from performing operations such as edit or delete on the primary record.
- **Read/Edit.** The Read/Edit access level allows the user to view and edit primary records.
- **Read/Edit/Delete.** The Read/Edit/Delete access level allows the user to view, edit, and delete primary records.

NOTE: Permission to create records of a primary record type is not controlled by the settings in step 2 of the Access Profile Wizard. The permission to create records of a primary record type is controlled by the settings in step 2 of the Role Management Wizard. For more information about roles, see Role Management (on page 302).

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Process of Setting Up Access Profiles (on page 332)
- How Access Rights Are Determined (on page 390)

About Access Levels for Related Record Types

You grant or revoke access rights to related record types in step 2 of the Access Profile Wizard. For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 332).

Related record types that are controlled through special privileges appear in all access profiles with the access level set to No Access by default. You must change the default setting to give your users the level of access that they require to the various record types.

For example, the Custom Object 04 record type is a related record type on the parent Opportunity record type. In the Full access profile, the Custom Object 04 related record type has its access level set to No Access by default. As a result, a user who is on an opportunity team with the Full access profile cannot see the related record types based on the Custom Object 04 related record type. If you want the user to see the Custom Object 04 records on opportunity records, you must change the default access level.

This topic describes the following:

- Record Relationships
- Access Level Options for Related Record Types

Record Relationships

The relationship between a parent record type and its related record type (the child record) determines the access-level options that are available for assignment to the related record type.

The relationships types and the available access level options are as follows:

- **One-to-many relationship.** In a one-to-many relationship, the parent record can have many child records of the related record type. For example, the Assets related record type is available in the Account Related Information page in the Access Profile Wizard. The Account parent record type has a one-to-many

relationship with the Assets related record type. The following access levels are available for the one-to-many relationship:

- View
- Read-only
- No Access

- **One-to-many-primary relationship.** In a one-to-many-primary relationship, the related record type is based on a primary record type, and the access rights of the primary record type can determine the access rights for the related record type. The parent record in a one-to-many-primary relationship can have many child records of the related record type. For example, the Opportunities related record type in the Account Related Information page is based on the Opportunity primary record type. The Account parent record type has a one-to-many-primary relationship with the Opportunities related record type. The following access levels are available for the one-to-many-primary relationship:

  - View
  - Read-only
  - No Access
  - Inherit Primary

- **One-to-child relationship.** In a one-to-child relationship, the child records are based on a record type that does not have a corresponding primary record type. Attachments, Notes, and Teams are some examples of related record types that do not have a corresponding primary record type.

  NOTE: An exception to this rule is the relationship between contact child records on an opportunity. Although the Contact record type has a corresponding primary record type, the relationship between the opportunity and the contacts is a one-to-child relationship. Users can add existing contacts to an opportunity, or remove contacts from an opportunity. Users cannot create new contacts from an opportunity.

  The following access levels are available for the one-to-child relationship:

  - Read/Create
  - Read/Create/Edit
  - Read/Edit
  - Read/Edit/Delete
  - Read-Only
  - No Access
  - Full

- **One-to-read-only relationship.** The one-to-read-only relationship is similar to the one-to-child relationship. However, as the name of the relationship suggests, users cannot edit or create the child records in a one-to-read-only relationship. Audit Trail is an example of a related record type that does not have a corresponding primary record type. Oracle CRM On Demand creates the Audit Trail record type. The following access levels are available for the one-to-read-only relationship:

  - Read-Only
  - No Access

- **Many-to-many relationship.** In a many-to-many relationship, the parent record type and the related record type are both based on primary record types, and the records of each record type can be the parent or child of the other, depending on how you view the relationship. For example, the Accounts related record type in the Custom Object 01 Related Information page in the Access Profile Wizard is based on the Account primary record type. The Custom Object 01 parent record type has a many-to-many relationship with the Accounts related record type.

  NOTE: The relationships between two record types can be different, depending on which record type is the parent, and which record type is the related record type. For example, although the Custom Object 01 parent record type has a many-to-many relationship with the Accounts related record type, the Account parent record type has a many-to-many-primary relationship with the Custom Objects 01 related record type.

  The following access levels are available for the many-to-many relationship:

  - Read/Create
  - Read-Only
  - View
  - No Access

- **Many-to-many-primary relationship.** A many-to-many-primary relationship is also a relationship in which the parent record type and the related record type are both based on primary record types, and the records of each record type can be the parent or child of the other. However, some additional access levels are available in the cases where the access rights of the primary record type can determine the access rights for the related record type. For example, the Custom Objects 01 related record type in the Account Related Information Page in the Access Profile Wizard Account is based on the Custom Object 01 primary record type. The Account parent record type has a many-to-many-primary relationship with the Custom Objects 01 related record type. The following access levels are available for the many-to-many-primary relationship:

  - Read/Create
  - Read-Only
  - View
  - No Access
  - Inherit Primary
  - Add/Inherit Primary
  - Add/Remove/Inherit Primary

  NOTE: The Read/Create access level is not supported for the following record types: Call Product Detail Message Responses, Call Product Detail Messaging Plan Item Relations, and Call Product Detail Messaging Plan Items.

Access Level Options for Related Record Types

The full set of access level options for related record types is as follows:

- **No Access.** The No Access option is available for all related record types. It prevents the user from viewing records in a related list.

- **Read-Only.** The Read-Only access level prevents the user from editing the related records inline on the parent record.
- **Read/Create.** The Read/Create access level is available for related record types that are one-to-child records or are part of many-to-many relationships. For one-to-child records, the Read/Create access level allows the user to create a new record or drill down on existing records to view the details, but it does not allow the user to edit or delete records. For many-to-many relationships, the Read/Create access level allows the user to associate an existing record as a child on a parent record, but it does not allow the user to remove an existing association.
- **Read/Create/Edit.** The Read/Create/Edit access level is available for related record types that are one-to-child records. It allows the user to create a new record or drill down on existing records to view the details and edit the record if required. The Read/Create/Edit access level does not allow the user to delete child records.
- **Read/Edit.** The Read/Edit access level is available for all relationships except related records that are read-only in one-to-read-only relationships. The Read/Edit access level allows the user to view and edit related records.
- **Read/Edit/Delete.** The Read/Edit/Delete access level is available for related record types that are child records in one-to-child relationships. The Read/Edit/Delete access level allows the user to drill down on existing records to view the record details, to edit the record, or to delete the record. The Read/Edit/Delete access level does not allow the user to create new child records.
- **Full.** The Full access level is available for related record types that do not have a corresponding primary record type. For such record types, the Full access level allows the user to create, view, edit, and delete records.
- **View.** The View access level is available for related record types in one-to-many and many-to-many relationships only. With the View access level, the behaviour of the related records is as follows:
  - All the child records that are related to a parent record are shown in the list of related records, irrespective of whether the user is authorised to see the child records themselves.
  - Each related record inherits the access level from its own primary record type rather than the access level of the parent record type in the relationship.

  For example, if the access level is set to View for the related Opportunity record type on the Account parent record type, then the behaviour of the related opportunity records is as follows:
  - All opportunities that are related to a parent account record are shown in the list of related records, irrespective of whether the user is authorised to see the opportunity records.
  - Each opportunity record inherits the access level from the primary Opportunity record type and not from its parent Account record type. When a user attempts to drill down on a related opportunity record to see more details of the record, the operation is successful if the opportunity record still exists, and only if the user is authorised to see the details of that opportunity record. If the user is not authorised to see the details of that opportunity record, then the user sees an error message.
- **Inherit Primary.** The Inherit Primary access level is available for certain one-to-many and many-to-many related record types only. With the Inherit Primary access level, the behaviour of the related records is as follows:
  - Only the related child records that the user is authorised to see are shown in the list of related records.
  - Each related record inherits the access level from its own primary record type rather than the access level of the parent record type in the relationship.

For example, if the access level is set to Inherit Primary for the related Opportunity record type on the Account parent record type, then the behaviour of the related opportunity records is as follows:

- Only those related opportunity records that the user is authorised to see are shown in the list of related records.
- Each opportunity record inherits the access level from the primary Opportunity record type and not from its parent Account record type. When a user attempts to drill down on a related opportunity record to see more details of the record, the operation is always successful if the opportunity record still exists because the user is authorised to see the details of all of the opportunity records in the list of related records.

For many-to-many relationships, selecting the Inherit Primary access level means that the user cannot add or remove a relationship between two existing records. However, the Inherit Primary access level is also available in combination with the Add access right, or in combination with the Add and Remove access rights.

NOTE: If the Inherit Primary access level (or any of its combinations) is found on any of the profiles used for a related record type, the Inherit Primary setting takes precedence. For example, if the Inherit Primary and View access levels are both found, the Inherit Primary access level overrides the View access level. If the Inherit Primary, Read-Only, and View access levels are all found, the Inherit Primary access right overrides the View and Read-Only access levels.

- **Add / Inherit Primary.** The Add/Inherit Primary access level is available for related records that share a many-to-many relationship with the parent. The Inherit Primary element of the Add/Inherit Primary access level works in the same way as the Inherit Primary access level. However, the Add/Inherit Primary access level also allows the user to associate an existing related record with the parent record. If a related record is successfully added, that record inherits the access level of its primary record. The Add/Inherit Primary access level does not allow users to remove an existing related record.
- **Add / Remove / Inherit Primary.** The Add/Remove/Inherit Primary access level is available for related records that share a many-to-many relationship with the parent. The Inherit Primary element of the Add/Remove/Inherit Primary access level works in the same way as the Inherit Primary access level. However, the Add/Remove/Inherit Primary access level also allows the user to associate an existing related record with the parent record, or to remove (dissociate) the link between the records. When a user removes or dissociates a related record, the record is not deleted and remains in the database. If a related record is successfully added, that record inherits the access level of its primary record.

As a general rule, for the related record types shown in the following table, the Inherit Primary access level is supported in all cases in which the record type is available as a related record type. However, the following exceptions apply:

- For the Household parent record type, the Leads related record type does not support the Inherit Primary access level.
- For the Partner parent record type, the Opportunity related record type does not support the Inherit Primary access level.

If the access level is currently set to View for any of the relationships indicated in the following table, then it is recommended that you change the access level from View to Inherit Primary.

NOTE: The access level that you set for the Completed Activities related record type applies to the records that are shown in the Completed Activities related information section in a parent record Detail page. The access level that you set for the Activities or Open Activities related record types applies to the records that are shown in the Activities, Open Tasks, Open Appointments, and Open Activities related information sections in a parent record Detail page.

Related Record Type
Accreditation Requests
Activities
Attendee Call
Business Plans
Call Product Detail Message Responses
Call Product Detail Messaging Plan Item Relations
Call Product Detail Messaging Plan Items
Calls
Certification Requests
Completed Activities
Course Enrolments
Custom Objects 01 and higher
Exam Registrations
Financial Account: Account Holder
Financial Account: Branch
Financial Account: Held Away Institution
Financial Accounts
Leads
Message Responses
Messaging Plan Item Relations
Messaging Plan Items
Objectives
Open Activities
Opportunities
Plan Accounts
Plan Contacts
Plan Opportunities
Service Requests

Related Record Type
Sub-Opportunities
Transaction Items

The following table lists the relationships where the Inherit Primary, Add/Inherit Primary, and Add/Remove/Inherit Primary access levels are all available. The relationships in this table are many-to-many relationships.

NOTE: If you currently use the Read/Create access level for any of the many-to-many relationships that support the Inherit Primary access level and its combinations, then it is recommended that you change the Read/Create access level to one of the Inherit Primary combinations on the related record types.

Parent Record Type	Related Record Type
Account	Custom Objects 01 through 03
Activity	Custom Objects 01 through 03
Campaign	Custom Objects 01 through 03
Campaign	Opportunities
Contact	Calls
Contact	Completed Activities
Contact	Custom Objects 01 through 03
Contact	Open Activities
Contact	Opportunities
Custom Objects 01 through 03	Completed Activities
Custom Objects 01 through 03	Custom Objects 01 through 03
Custom Objects 01 through 03	Open Activities
Custom Objects 01 through 03	Leads
Custom Objects 01 through 03	Opportunities
Custom Objects 01 through 03	Service Requests
Dealer	Custom Objects 01 through 03
Dealer	Service Requests
Fund	Custom Objects 01 through 03
Household	Custom Objects 01 through 03
Lead	Custom Objects 01 through 03
Event	Custom Objects 01 through 03

Parent Record Type	Related Record Type
Opportunity	Custom Objects 01 through 03
Partner	Custom Objects 01 through 03
Portfolio	Custom Objects 01 through 03
Service Request	Custom Objects 01 through 03
Solution	Custom Objects 01 through 03
Solution	Service Requests
Vehicle	Custom Objects 01 through 03

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Process of Setting Up Access Profiles (on page 332)
- How Access Rights Are Determined (on page 390)

Process of Setting Up Access Profiles

This topic describes how to set up access profiles.

NOTE: Oracle CRM On Demand generates audit records of all changes to access profiles. If your user role includes the Access Master Audit Trail and Admin Configuration Audit privilege, then you can view the audit trail of the changes to access profiles. For more information about viewing the audit trail, see Reviewing the Audit Trail for Administration Configuration Changes (on page 81).

Before you begin. To view, create, or revise access profiles at your company, your role must include the Manage Roles and Access privilege.

To set up an access profile, perform the following tasks:

1. Adding Access Profiles (on page 332).
2. Specifying Access Levels for Primary Record Types (on page 334).
3. Specifying Access Levels for Related Record Types (on page 335).

For links to topics that provide additional information about access profiles, see Related Topics for Access Profiles (on page 335).

Adding Access Profiles

You can add an access profile by doing the following:

- Creating a new profile

- Copying an existing profile and editing its access levels

The following procedure describes how to add an access profile.

To add an access profile

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the Access Profile Management section, click the Access Profiles link.
4. In the Access Profile List, perform one of the following:
   - To create a new profile based on an existing profile, click Copy on the profile that you want to copy.
   - To create a new profile that is not based on an existing profile, click New in the title bar.

   The Access Profile Wizard opens to guide you through the process.
5. In Step 1 of the Access Profile Wizard, provide a name and description, and set the remaining fields as needed. The remaining fields are described in the following table.

Field	Description
Mark for Translation	The Mark for Translation check box is effective only in both of the following circumstances: - When the name of an existing access profile is being changed - The existing access profile name has already been translated into one or more additional languages In these circumstances, you can use the Mark for Translation check box to indicate whether the translated access profile name is to be replaced by the new name or it is to remain unchanged. Depending on the setting of the Mark for Translation check box, the access profile name is displayed as follows: - If you select the Mark for Translation check box, then the new name is displayed in the language in which it was entered, regardless of the language used for viewing the list of access profiles. When the list of access profiles is viewed in the language in which the new name was entered, the name is displayed in the default font. However, when the list of access profiles is viewed in any other language, the name is displayed in blue font within brackets. - If you do not select the Mark for Translation check box, then the new name appears when the list of access profiles is viewed in the language in which the new name was entered. However, when the list of access profiles is viewed in any other language, the original translated access profile name still appears.

Field	Description
	The Mark for Translation check box does not have any effect when a new access profile is added. When a new access profile is added, the new name automatically appears in the list of access profiles in all languages. When the list of access profiles is viewed in the language in which the new name was entered, the name of the new access profile is displayed in the default font. When the list of access profiles is viewed in any other language, the name of the new access profile is displayed in blue font within brackets.
Grantable to Team Members	To make the access profile available to assign to team members, select this check box.
Grantable to Book Users	To make the access profile available to assign to book users, select this check box. For more information, see Creating Access Profiles for Books (on page 373).
Disabled	If you select this check box, then the access profile is disabled. A disabled access profile cannot be used in any new associations with roles, teams, or books. However, the disabled access profile continues to function as the access profile where it has been associated previously with a role, team, or book until you assign a different access profile to the role, team, or book.

NOTE: By default, the Grantable to Team Members and Grantable to Book Users check boxes are selected on the predefined Edit, Full and Read-Only access profiles. Therefore, when a user adds another user to a team or a book, the picklist of access profiles that appears in the Add Users or Edit Users dialog box includes these predefined access profiles. If you want to prevent users from assigning any of these three access profiles to a user in a book or a user book in a team, deselect the appropriate check box for that access profile.

Specifying Access Levels for Primary Record Types

To specify access levels for primary record types, complete the steps in the following procedure.

To specify access levels for primary record types

1. In Step 2 of the Access Profile Wizard, select the access level for each of the primary record types. Choose from:
   - Read-Only
   - Read/Edit
   - Read/Edit/Delete

   For more information about the access levels for primary record types, see About Access Levels for Primary Record Types (on page 324).

2. If you want to specify access levels for the related record types for a primary record type, click the Related Information link for the primary record type. Otherwise, click Finish to save your changes.

Most record types have a Related Information link. Related information appears as linked records on the record Detail pages. For more information about specifying access levels for related record types, see Specifying Access Levels for Related Record Types (on page 335).

Specifying Access Levels for Related Record Types

To specify the access levels for related record types, complete the steps in the following procedure.

To specify access levels for related record types

1. In step 2 of the Access Profile Wizard, click the Related Information link for the primary record type for which you want to specify the access level for one or more related record types.

2. Select the appropriate access level for each related information record type.

   The picklist of the access level options that appears in the access level field for each related record type depends on the relationship of the related record type to its parent record type. Depending on the access level that you set in this field and in the Role Management Wizard, you can grant or revoke users' rights to create, update, or view records of that record type.

   For more information about the access levels for related record types, see About Access Levels for Related Record Types (on page 325).

   NOTE: To create a new opportunity, the access level for the Revenue related record type on the Opportunity record type must be set to Full.

   For information about the access profile settings that are required for converting leads, see Access Profile and Role Settings for Converting Leads. For information about the access profile settings that are required for converting deal registrations, see Access Profile and Role Settings for Converting Deal Registrations.

3. When you finish setting the access levels on the related record types for a primary record type, click Previous to return to the main page of step 2 of the wizard.

4. Repeat steps 1 through 3 of this procedure for each primary record type for which you want to specify the access levels for one or more related record types.

5. When you finish setting the access levels for all of the primary record types and their related record types, click Finish to save your settings.

Related Topics for Access Profiles

See the following topics for related information:

- Access Profile Management (on page 317)
- About Access Profiles in Roles (on page 319)
- About Access Profiles in Teams, Groups, and Books (on page 320)
- About Access Propagation Through Team Inheritance (on page 321)
- Working with the Access Profile List Page (on page 323)

- How Access Rights Are Determined (on page 390)

Personalisation Management

Users can personalise certain areas of Oracle CRM On Demand, such as the record Detail page layouts, Homepage layouts, and Action bar layouts. However, if you want users who have a certain role to stop using personalised layouts and to use the default layouts for their role again, then you can remove the personalised layouts for those users. For example, you can remove all personalized Homepage layouts for users who have the Sales Rep role, or remove all personalised Action bar layouts for users who have the Sales Manager role.

For more information on managing personalisation in Oracle CRM On Demand, see the following topics:

- Resetting Personalised Page Layouts (on page 336)
- Resetting Personalised Action Bar Layouts (on page 337)
- Resetting Personalised Homepage Layouts (on page 337)

Resetting Personalised Page Layouts

You can remove all personalised page layouts for users with a specific role in Oracle CRM On Demand and restore the default page layout for that role. When you reset the layout to the default layout for a record type for a role, the following happens:

- All personalised related information layouts are restored to the default layout.
- All personalised field layouts are restored to the default layout.
- All personalised settings for displaying record indicators for related information sections are restored to the settings configured for the record type at role level.

Before you begin. To perform this procedure, your role must include the Manage Roles and Access privilege.

To reset personalised page layouts

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, in the Personalisation Management section, click the Reset Page Layouts link to open the Page Layout Reset page.
4. In Step 1, Select Role, select the role for which you want to reset the page layout, and click Next.

5 In Step 2, Select Layout, choose the record type layouts that you want to reset by moving record types from the Available section to the Selected section using the left and right arrows, and click Next.

6 In Step 3, Confirm, verify your selections, and then click Finish to save your changes.

NOTE: After you reset a page layout for a user role, users who have the role must sign out of Oracle CRM On Demand and sign in again to see the change to the layout.

Resetting Personalised Action Bar Layouts

You can remove all personalised action bar layouts for users with a specific role in Oracle CRM On Demand and restore the default action bar layout for that role.

Before you begin. To perform this procedure, your role must include the Manage Roles and Access privilege.

To reset personalised action bar layouts

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

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

3 On the User Management and Access Controls page, click the Reset Action Bar Layouts link.

4 On the Action Bar Layout Reset page, select which role you want to reset the action bar layout for, and click Next.

5 On the Summary Page, click Finish.

6 On the Summary Page, click Finish.

Resetting Personalised Homepage Layouts

You can remove all personalised homepage layouts for users with a specific role in Oracle CRM On Demand and restore the default homepage layout for that role.

Before you begin. To perform this procedure, your role must include the Manage Roles and Access privilege.

To reset personalised homepage layouts

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

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

3 On the User Management and Access Controls page, click the Reset Homepage Layouts link.

4 On the Homepage Layout Reset page, select which role you want to reset the page layout and click Next.

5 In the Select Layout page, choose the homepage layouts that you want to reset by moving the available homepage layouts from the Available section to the Displayed section using the left and right arrows, and click Next.

Book Management

Books are an efficient method of organising and segregating records, so that users can collaborate without being team members for each record.

Using books to organise your company data makes searches for records faster and more efficient. Books can coexist with groups and teams. If your requirements for providing access to groups of users are straightforward and relatively simple, you can use group assignment. However, if the requirements of group-record ownership are more complex, you are recommended to use books.

Default User Books

In Oracle CRM On Demand, a default book is assigned to each user, and bears the user's name. When a record is assigned to a user, the record is assigned to the user's default book. Where a record is owned by a team, the team represents the set of default books of the users who are members of the team. User books are automatically associated with records when the record owner is changed, and when team membership is changed.

Custom Books

When the book functionality is enabled, you can create custom books to organise your data to suit your business purposes. Typically, custom books are referred to as *books*. Books can be independent of each other, or you can organise your books into hierarchies. For example, you can create books to segment your data according to the organisational units of your business, such as territories or products. You can then set up users to have the appropriate level of access to the books.

Books Created Automatically for Partners

When a partner record is made active in Oracle CRM On Demand, a book that can contain data is automatically created for the partner organisation. The books that are automatically created for partners are available for selection in the Book lookup window that is accessed from the Partner record pages when in the Books related item on a partner record. The Partner record pages are accessible to users in the brand owner company only. If the Access to Partner check box or the Reciprocal Access to Partner (Reverse) check box is selected when a partner relationship is added to a partner record, the books that were automatically created for the related partners are synchronised. Then, wherever partner accounts are associated in Oracle CRM On Demand, the partner users who are associated with each of the synchronised partner books can see the partner accounts to which their partner organisation is related.

When a user is added to a partner organisation, the user is also automatically associated with the partner book for the partner organisation.

Custom Books for Partners

You can also create custom books for partner organisations. You can assign any combination of users, including users from the brand owner company, and users in partner organisations, to such custom books, as required.

Record Types Supported for Books

In the same way that records of different types can be assigned to the same user, records of different types can be assigned to the same book. The following record types can be assigned to books:

- Account
- Accreditation
- Allocation
- Application
- Appointment
- Business Plan
- Campaign
- Certification
- Contact
- Course
- Custom Objects
- Deal Registration
- Dealer
- Event
- Exam
- Financial Account
- Financial Plan
- Fund
- HCP Contact Allocation
- Household
- Inventory Audit Report
- Inventory Period
- Lead
- MDF Request
- Messaging Plan
- Objective

- Opportunity
- Order
- Partner
- Policy
- Portfolio
- Programme
- Sample Lot
- Sample Request
- Sample Transaction
- Service Request
- Smart Call
- Solution
- Special Pricing Request
- Task
- Vehicle

Books in the Book Selector

If the Book selector is enabled for the company, the Book selector field appears in targeted searches and advanced searches, in the title bar of list pages, and in the Analytics Homepage. The Book selector is used to limit a targeted search to a custom book or a user book that can contain the record that the user wants to find. The plus sign (+), which appears in the Book selector field, indicates the presence of sublevels.

NOTE: Partner books appear in the Book selector for the Partner record type only.

Clicking the icon next to the Book selector displays the book hierarchy, which is organised as follows:

- **All.** The default root node for all books, including custom books and user books
  - **Books.** The default root node for all custom books set up for your company
  - **Users.** The default root node for all user books

All, Books, and Users are nodes or anchors. They are not real books. As an example of a book hierarchy, assume that a company sets up a geographic book hierarchy for America. Assume that a user, John Williams, who has subordinates, is also associated with the books in the geographic hierarchy. For this user, the following hierarchy is shown in the Book selector, under the All option:

- **Books**
  - **America** (The parent book)
    - **North** (Subbook. A subbook can also be a parent book for a further level of subbooks.)
    - **East** (Subbook)
    - **West** (Subbook)

- **South** (Subbook)

- **Users**
  - **John Williams** (User who has subordinates)
    - **Lucy Harris** (Subordinate. A subordinate can also have subordinates.)
    - **Rick Rogers** (Subordinate)
    - **Donna Jones** (Subordinate)
    - **Jeff Smith** (Subordinate)

NOTE: Books at the lowest level of a hierarchy are called leaf-node books.

The Include Sub-Items check box in the Book selector allows the user to specify that data in subitems (subordinates or subbooks) is to be included in the search. For information about how the Book selector works in reports, see About Visibility to Records in Analytics and About Limitations in Analytics.

Selecting Books for Searches

When searching for records, users select the book that contains the data they want to find. If users cannot be sure which book at a certain level of a book hierarchy contains the data they are looking for, the users select the next book higher up in the hierarchy for the search.

If the user selects the Include Sub-Items option in the Book selector, and the Manager Visibility Enabled check box is selected in the company profile, the data in the subbooks or subordinates is included in the search.

As an example, consider the following book hierarchy:

- America
  - North
    - North Area 1
    - North Area 2

If a user is unsure whether a record is in North Area 1 or North Area 2, the user selects the North book for the search, rather than selecting the America book.

Related Topics

For information about designing your book structures, setting up books, and enabling users to use books, see the following topics:

- About Designing Book Structures (on page 342)
- About Web Services Support for Books (on page 346)
- About Record Ownership Modes (on page 346)
- Record Ownership Modes and Automatically Generated Tasks (on page 351)
- About Importing Books and Book Assignments (on page 356)
- About Time-Based Book Assignments (on page 357)
- Scenario for Using Books to Manage Sales Territories (on page 360)

- Example of Using Books to Manage Sales Territories (on page 360)
- Process of Setting Up Books (on page 362)
- Verifying Book Set-up for the Administrator Role (on page 363)
- Creating Book Types and Book User Roles (on page 366)
- Configuring Record Ownership Modes (on page 367)
- Creating Books and Book Hierarchies (on page 368)
- Associating Users with Books (on page 370)
- Creating Access Profiles for Books (on page 373)
- Enabling Books for Your Company (on page 374)
- Enabling Books for Users and User Roles (on page 375)
- Adding Books to Record Detail Page Layouts (on page 377)
- Assigning Records to Books (on page 378)
- Book Hierarchy Page (on page 380)
- Book Fields (on page 381)
- Information about Troubleshooting Books (on page 382)

About Designing Book Structures

To set up an efficient book structure, you must plan your book hierarchies carefully. Consider the following guidelines when you design and refine the book hierarchies for your company:

- Do not create custom books that replicate user books.
- Determine the organisation and access policies for your business data.
- Determine whether the corporate structure is relevant to data management.
- Determine the data affiliations in your company.
- Design your books based on user needs, and consider the tasks where users most commonly use books.
- Design your books so that the functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.
- Keep the number of levels in your book hierarchies to a minimum.
- As far as possible, reduce the amount of cross-listing in the book structure. *Cross-listing* is the practice of duplicating records across multiple books.
- Use workflow rules to automate book management. Also, when designing your book names, consider the feature that allows you to use a single workflow action to assign a different book to different records, by using an expression that resolves to a book name.

User Books

The disadvantage of creating custom books that replicate user books is that the data in the custom books and in the default user books must be synchronised. This additional task increases server-processing time, and affects the speed at which records are retrieved.

NOTE: One reason why a company might consider replicating user books is to give a user temporary access to another user's data. A better way of meeting this need is to add the user who wants to access the data as a delegate for the user who owns the data.

Data Access Needs

Your book structure does not have to reflect your company's corporate hierarchy. Instead, it is recommended that your book structure should closely reflect how your company organises its data. Parts of your business can be organised by geography, while other parts can be organised by product line or industry. Pay special attention to cases where:

- Two (or more) departments must not be able access data belonging to the other department
- Two (or more) departments must be able to access data belonging to the other department

Relevance of Corporate Structure

In many companies, a parent organisation has complete access to all data in the child organisations. Members of such a parent organisation typically have global access to data across all child organisations.

If your organisation is structured in this way, it is recommended that you do not to set up books that reflect organisational structure at the parent organisation level. However, consider the following:

- Setting up books that reflect the organisational structure at other levels (such as child organisation level)
- Setting up other book hierarchies at parent organisation level. For example, at parent organisation level, you can create a book or book hierarchy that allows users at parent organisation level to view opportunities that have significant revenue potential, across all child organisations.

Data Affiliations

Examine the procedures that your company follows when a user transfers from one department to another. For example:

- If the data that the user manages always moves to the new department with the user so that there is continued affiliation of data, it is best to manage your data through record ownership and teams. Typically, appointments and tasks move with the user at all levels. In some sales environments, all customer data moves with the user. This data affiliation is true for small and medium businesses and for businesses that focus on low volume, high-value sales.
- If the data usually stays in a fixed organisation, such as a geographical organisation, so that there is organisational ownership of data, it is best to manage the data through books that reflect the organisational structure.
- If both continued affiliation and organisational ownership continue to exist for some time after the user moves to another department, the two hierarchies can coexist.

User Needs and Tasks

When designing your book structure, consider the task where users most commonly use books, including working through lists, searching for records, and creating and using reports.

Working Through Lists

To help you to identify the lists that users need, determine the types of lists that are most frequently used, and the ideal lists for your users. Ask the users in your company for input to help you to do this. If no book in your book structure contains all the necessary records for an ideal list, the book structure is probably missing a hierarchy. For example, you can set up both a geographic hierarchy and a product-orientated hierarchy.

If users spend a lot of time working in a specific subset of one book, create a subbook for the subset. Name the subbook in a way that allows users to recognise it. The subbook can also be set as the default for the Book selector, so that users do not have to select the appropriate book every time. For more information about setting the default for the Book selector, see Enabling Books for Users and User Roles (on page 375).

Searching for Records

To determine the search needs of the users in your company, ask the users about scenarios where they look up particular records. Your book structure and book sizes should reflect the searches and search criteria that users perform most frequently.

NOTE: If you already have a book structure in place, and are further refining it, ask users if they can typically identify that a particular record is part of a particular book in the hierarchy. If the users consistently say that they can be certain only about a book at a higher level, ask them if another subdivision of the book structure would allow them to narrow their search further. Users should be forced to search higher-level books only as an exception to their normal searches.

The fields that are used in a search also affect the speed of the search:

- Using indexed fields to search for records in books results in optimal performance. (Indexed fields are shown in green text in the search sections.)
- When nonindexed fields (rather than indexed fields) are used to search for records in books, searches are slower, and performance is affected by the volume of records that are searched. (Search fields that are not indexed are shown in black text in the search sections.)

For example, if you determine that users typically search contact records based on indexed fields, the number of records for the lowest-level book (called the leaf-node book) might be up to 100,000 for each record type. However, if users typically search contact records based on nonindexed fields, you can restrict the size of your leaf-node books to between 20,000 and 30,000 records for each record type.

Data configuration varies from company to company. As a result, there is no recommended number of records for books. You must manage book size continuously. Books facilitate faster searches by reducing the number of records that are searched.

Creating and Using Reports

All users except administrators are subject to data-visibility rules for reports. When a user book or custom book is specified in the Book selector for reporting, the data considered for the reports is as follows:

- All content in historical analyses (including historical analyses accessed from the Analytics tab, and reports embedded in record Homepages) is restricted to the book and includes all sublevels of the selected book.

Records that the user owns, or where the user is a member of a team, are not included unless those records are also in the selected book or one of its subbooks.

- Real-time reporting is restricted to data directly associated with the book (custom book or user book) selected in the Book selector. If the selected book has subbooks or subordinates, the data in the subbooks or subordinates is ignored in real-time reports.

NOTE: Although you do not typically need to change your book structure after you set it up, you can do so. No downtime is required to make such changes, and the changes are applied immediately. However, the changes are not immediately reflected in the data in real-time reports.

For more information about visibility to records in reports, see About Visibility to Records in Analytics.

Manager Visibility

When you are designing your book hierarchies, base your designs on the following principles:

- The functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.
- The Include Sub-Items option is seldom or never used in searches of large data volumes. (The number of records that constitutes a large data volume differs from company to company and according to search patterns.)

  There are cases where it is necessary to use the Include Sub-Items option. For example, managers need to run lists on user books that include their subordinates, because their subordinates cannot share data with each other. If the volumes are large, then the search time increases. However, for optimal performance, select the Include Sub-Items option only when necessary.

Hierarchy Levels

Book hierarchies that have large numbers of levels, with records at every level, behave in a similar way to the team functionality where manager visibility is enabled. Such hierarchies perform well with small data sets. However, as data volumes grow, books with fewer levels in the hierarchy (or with no hierarchy levels) perform far better than team functionality.

If one level of your book hierarchy provides no additional value to data security or data organisation, merge the redundant book and its subbooks. Ask book users if they can typically identify whether a record is in one subbook or another subbook of the same parent book; if they cannot, it indicates that the best option is to collapse the two subbooks into the parent book.

A simple method of reducing the number of levels in a book hierarchy is to prefix subbooks with the name of the parent book. For example, if you have a subbook called North with a parent book called North America, remove the parent book, and rename the subbook as NA – North.

Cross-Listing

Cross-listing is the practice of duplicating records across multiple books. Cross-listing has an administrative overhead for users, because synchronisation is required, resulting in many read-write operations that affect the server's performance. Keep cross-listing to a minimum.

Automated Book Management

Typically, book assignment criteria are mapped to one or more fields in a record type. You can create workflow rules to automatically reorganise the book assignment when one of those fields changes.

For example, if you have a book hierarchy called *Territory,* you can create a workflow rule to monitor a field in a record type (for example, the Territory field on accounts), and then create an Assign a Book action on the rule to update the Territory book on the record with a new book when the Territory field value on the account changes.

When you design your book names, consider whether you want to use Assign a Book workflow actions in such a way that a single workflow action can assign a different book to different records, based on an expression that resolves to a book name.

For example, assume that you have accounts in North America, and you also have accounts based in EMEA. You might want to set up two separate books for the different locations, and assign the appropriate book to an account depending on the location of the account. To set up this configuration, you can create two books, one named North America and the other named EMEA. You can then create a custom picklist field called Sales Location, with the values North America and EMEA, and add the custom field to the page layout for the Account record type for the appropriate roles. Then, you can create an Assign a Book workflow action that does the following when an account record is updated:

- Evaluates an expression to determine the value that is selected in the Sales Location field on the account record.
- Associates the account record with the book whose name matches the value returned by the expression.

Related Topics

See the following topic for related information:

- Creating Workflow Actions: Assign a Book (on page 459)

About Web Services Support for Books

Books can be managed through Web services. When books are enabled for your company, the Book Web services description language (WSDL) is available for download. For more information about Web services, see *Oracle Web Services On Demand Guide*.

About Record Ownership Modes

Depending on your company's business needs, you might not want to assign owners to records of a certain record type. Instead, you might want to organise your records in such a way that you do not need to reassign ownership of records when employees move to other responsibilities, or when sales teams are realigned because business models change. Starting with Release 20, Oracle CRM On Demand allows you to support such business needs by associating a primary custom book with a record instead of assigning an owner to the record. Any user who is a member of the primary custom book on a record can access and work with that record, as long as the user's role and access profile settings give the user the necessary access rights. Your company might also want to set up some record types so that records of that type are not required to have either an assigned owner or an associated primary custom book.

Oracle CRM On Demand allows you to set up the following modes of record ownership for most of the record types that use books:

- **User mode.** User mode is similar to record ownership in Release 19 and earlier releases of Oracle CRM On Demand. When a record type is configured in user mode, each record of that record type must have an owner assigned to it. If the Book field is available on the detail page of the record, then the Book field displays the user book associated with the owner.

  NOTE: Service request records can exist without an owner by default, and some record types such as Users and Products do not have owners on the records. This functionality is unchanged from earlier releases of Oracle CRM On Demand.

- **Book mode.** When a record type is configured in book mode, the records of that record type cannot have an owner assigned to them. Instead, a primary custom book is required for each record. Any user who is a member of the primary book on a record has access to and can work with the record, as long as the user's role and access profile settings give the user the necessary access rights. You can use book mode only with record types that support books.

- **Mixed mode.** Mixed mode is also referred to as *user or book mode*. When a record type is configured in this mode, a record of that record type can be set up in any one of the following ways:

  - The record can exist without either an assigned owner or an associated primary custom book. Users can access such a record through team membership or membership of a book associated with the record. Users whose user role has the Can Read All Records check box selected in Step 2 of the Role Management wizard can also access the record.
  - The record can have an owner assigned to it.
  - The record can have a primary custom book associated with it.

  NOTE: The record cannot have both an assigned owner and a primary custom book.

  You can use mixed mode only with record types that support books.

NOTE: You must use the user mode of record ownership for the Sample Transaction record type, because every sample transaction must be related to an inventory period for a specific user. Do not configure book mode or mixed mode for the Sample Transaction record type.

Regardless of the ownership mode that you configure for a record type, users can assign additional books to a record, and users can link additional users to a record if the record type supports teams. A user who is a member of any book that is assigned to a record can access the record and can work with the record, as long as the user's role and access profile settings give the user the necessary access rights.

Reporting

For the Account and Contact record types, you can create real-time and historical reports based on the relationship between the records and the primary book on the records. For more information about reporting and record ownership modes, see About Visibility to Records in Analytics.

Record ownership modes do not impact the data-visibility rules that apply when you select a book in the Book selector in Analytics. For more information about the data-visibility rules for books in reporting, see About Designing Book Structures (on page 342).

Record Types That Support Record Ownership Modes

Record ownership modes are supported for record types that support custom books, with the following exceptions:

- Allocation
- Fund
- Inventory Audit Report
- Inventory Period
- Messaging Plan
- Smart Call
- Solution

You can configure all of the other record types that support custom books in user mode, book mode, or mixed mode. You can use a mixture of ownership modes for the various record types that support books. For example, you can configure the Contact record type in book mode, and configure the Account record type in user mode. You can change the record ownership mode for a record type at any time. You configure the record ownership mode for a record type by configuring the Owner and Book fields on the record type as required or not required, as shown in the following table.

NOTE: The page layouts for the record type must be set up correctly for the record ownership mode. For more information, see About Field Set-up and Page Layouts for Record Ownership Modes (on page 112).

Record Ownership Mode	Owner Field Set to Required	Book Field Set to Required	Other Configuration Details	Comments
User Mode	Yes	No	None	If the Book field is present on a record layout, then the field is read-only and shows the name of the user book for the user who is the assigned owner of the record.
Book Mode	No	Yes	(Optional) Set the Owner field to Read-Only.	If the Owner field is present on a record layout, then the field must be blank. The Book field is a picklist field that contains a list of the custom books you set up for your company.
Mixed Mode	No	No	None	If a custom book is selected in the Book field on a record, then the Owner field is blank. If a user is selected in the Owner field, then the Book field is automatically set to the name of the user book for the owner.

Default Record Ownership Mode

For existing companies that were created in Release 19 or earlier releases of Oracle CRM On Demand, user mode is the default record ownership mode except for the Service Request record type, which is configured in mixed mode by default. For new companies, mixed mode is the default record ownership mode for the record types that support record ownership modes.

Default Values in Owner and Book Fields

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

- If the record type is configured in user mode, then the Owner field is automatically populated with the alias of the current user. The Book field, if it is present, is automatically populated with the name of the user book for the current user.
- If the record type is configured in mixed mode, then neither the Owner field nor the Book field is populated.

  NOTE: Appointments that users create through their calendar are an exception to the normal behaviour for record ownership modes. When a user creates an appointment through the user's calendar, the Owner field is populated with the name of the current user, regardless of the record ownership mode.
- If the record type is configured in book mode, then the following happens:
  - The Owner field on the new record is not populated.
  - For the Book field, the default value depends on the default book that is specified for the record type on the current user's user record, as follows:
    - If a custom book is specified as the default book for the record type, then the Book field on the new record is automatically populated with the name of the specified default book.
    - If a default book is not specified for the record type, or if a user book or the All book is specified as the default book for the record type, then the Book field is not populated on the new record.

    For information about setting up default books by record type for a user, see Setting Up Default Books by Record Type for a User (on page 287).

NOTE: If the Owner field is required on a page layout, and if the record type is in mixed mode, then the Owner field is blank by default when a user opens a New record page that uses that page layout. For more information about the field set-up and page layouts for record ownership modes, see About Field Set-up and Page Layouts for Record Ownership Modes (on page 112).

Considerations for Record Ownership Modes

When configuring the record ownership mode for a record type, consider the following:

- **Assignment manager.** The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. If there is a primary custom book assigned to the record before the assignment manager reassigns the record to an owner, then the assignment manager removes the primary book from the record. The assignment manager cannot reassign records if the record type is configured in book mode. If you configure a record type in book mode, then it is strongly recommended that you make all rule groups for that record type inactive. For more information about assignment rules, see About Assignment Rules (on page 505).

- **Working with other applications.** The following applications require records to have an owner. You cannot use these applications if the record type that the application works with is configured in book mode, and if the record type is configured in mixed mode, then the records must have owners:
  - Oracle Outlook Email Integration On Demand
  - Oracle Notes Email Integration On Demand
  - Oracle CRM On Demand Integration for Office
  - Oracle CRM On Demand Connected Mobile Sales
- **Updating records after changing ownership mode.** If you change the record ownership mode for a record type to user mode, consider updating all of the records of that type to have an owner. Otherwise, the user who next updates a record of that record type will be forced to select an owner for the record. Similarly, if you change the record ownership mode for a record type to book mode, consider updating all of the records of that type to have an appropriate primary custom book assigned to them. Otherwise, the user who next updates a record of that record type will be forced to select a primary custom book for the record.

What Happens When You Change the Record Ownership Mode for a Record Type?

If your company changes the record ownership mode for a record type from one mode to another mode, then the new ownership mode is enforced for any new records of that record type. For existing records, the behaviour is as follows:

- **When the new record ownership mode is user mode.** The following happens when a record is updated for the first time after the ownership mode changes:
  - If the record does not already have a user assigned as the owner, then the user who updates the record is required to select a user in the Owner field.
  - If the record previously had a primary custom book associated with it, then the name of the primary book is cleared from the Book field, and the name of the user book for the new owner is shown in the Book field. The book is also removed from the record and no longer appears in the Books section of the record Detail page.
- **When the new record ownership mode is book mode.** The following happens when a record is updated for the first time after the ownership mode is changed:
  - If the record does not already have a primary book associated with it, then the user who updates the record is required to select a primary custom book in the Book field.
  - If the record previously had an assigned owner, then the following happens:
    - The Owner field is cleared on the record.
    - If the record type supports teams, then all of the members of the team, except the former owner of the record, remain as members of the team. The behaviour is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the team. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

NOTE: In the standard application, the former owner of the record is not retained as a member of the team, as described here. However, your administrator can configure the record type so that the former owner of the record is retained as a member of the team on the record. For information about configuring a record type to retain the former owner as a member of the team, see Customising Previous Ownership for Shared Records (on page 261).

- **When the new record ownership mode is mixed mode.** The following happens when a record is updated for the first time after the ownership mode is changed. This behaviour also applies each time the record is updated while the record type is in mixed mode:
  - The user who updates the record is not required to select an owner or primary book.
  - The user who updates the record can select an owner or a primary custom book for the record but not both.
  - If a user assigns an owner to a record, and a primary custom book was previously associated with the record, then the Book field is cleared on the record. The book is also removed from the record and no longer appears in the Books section of the record Detail page.
  - If a user associates a custom book as a primary book on the record, and the record previously had an assigned owner, then the following happens:
    - The Owner field is cleared on the record.
    - If the record type supports teams, then all of the members of the team, except the former owner of the record, remain as members of the team. The behaviour is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the record. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

What Happens If Records Are Updated Through The Mass Update Functionality?

The Mass Update functionality, which is supported for certain record types only, allows users to update fields in group of records from list pages. When a user uses the Mass Update functionality to update a group of records, the user is not forced to provide values for any required fields that are null on the records. Therefore, if a user updates a group of records after the record ownership mode for the record type is changed, then the user is not forced to select an owner or a primary custom book on the records that the user updates, even if the new record ownership mode requires the records to have an owner or a primary custom book.

Record Ownership Modes and Automatically Generated Tasks

Record ownership modes affect the ownership of the tasks that are generated automatically by Oracle CRM On Demand, such as the tasks that are generated by the Create Task actions in workflow rules and the tasks that are generated by the sales stages in sales processes.

Considerations for Generated Tasks

When generating tasks, Oracle CRM On Demand considers the following:

- The option selected in the Owner field of the workflow action or sales stage task
- The values in the Owner and Book field of the source record if any values are present in those fields

  NOTE: The source record for a sales stage task is the opportunity from which the sales process is accessed, or in some cases, the account that is linked to the opportunity. The source record for a workflow action is the record that triggers the workflow rule.
- The record ownership mode of the Activity record type

How Oracle CRM On Demand Assigns Owners and Primary Custom Books to Generated Tasks

Oracle CRM On Demand can assign either an owner or a primary custom book to an automatically generated task, but not both. Oracle CRM On Demand can assign one of the following as the owner for an automatically generated task:

- One of the following users:
  - The owner of a source record
  - The manager of the owner of a source record
  - A user who has a team role or a team user role

    NOTE: *Team roles* are the roles that describe the parts that users perform within a team on a record. *Team user roles* are the Oracle CRM On Demand roles that are assigned to all users in Oracle CRM On Demand, including the users who are members of teams on records. Each member of a team on a source record can have a team role as well as a team user role.
- For tasks generated by a workflow action, the owner specified in the workflow action

Oracle CRM On Demand can assign one of the following as the primary custom book for an automatically generated task:

- The primary custom book associated with a source record
- The default custom book for one of the following:
  - The owner of a source record
  - The manager of the owner of a source record
  - A user who has a team role or a team user role

  The user's *default book* for the task is determined as follows:

  - If a default custom book that can contain data is associated with the Activity record type in the user's record, then that book is the default book.

    NOTE: The default books for record types are specified in the Default Book by Record Type section of the User Detail page.
  - If the default book for the Activity record type in the user's record is not specified, and a default custom book that can contain data is specified in the Default Book field on the user's record, then the book specified in the Default Book field on the user's record is the default book.

NOTE: The default book must be a custom book. Oracle CRM On Demand cannot assign a user book as the primary book for a task. In addition, the default custom book must be a book that can contain data.

If an appropriate owner or primary custom book that can contain data cannot be identified, then Oracle CRM On Demand does not generate the task. The following table shows how Oracle CRM On Demand determines which owner or primary custom book to assign to a generated task.

Owner Option in Workflow Action or Sales Stage Task	Source Record: Owner or Primary Custom Book	Activity Record Type: User Mode	Activity Record Type: Book Mode	Activity Record Type: Mixed Mode
Source record owner	Owner	The owner of the source record is the owner of the task.	If the owner of the source record has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task. If the owner of the source record does not have a default book, then the task is not created. No error message is returned.	The owner of the source record is the owner of the task.
Source record owner	Primary custom book	The task is not created. No error message is returned.	The primary custom book from the source record is assigned as the primary book for the task.	The primary custom book from the source record is assigned as the primary book for the task.
Source record owner	No owner and no primary custom book	The task is not created. No error message is returned.	The task is not created. No error message is returned.	The task is not created. No error message is returned.

Owner Option in Workflow Action or Sales Stage Task	Source Record: Owner or Primary Custom Book	Activity Record Type: User Mode	Activity Record Type: Book Mode	Activity Record Type: Mixed Mode
Manager of source record owner	Owner	If the owner of the source record has a manager, then the manager is the owner of the task. If the owner of the source record has no manager, then the behaviour is as follows: ■ For sales processes, the owner of the source record is the owner of the task. ■ For workflow actions, the task is not created and no error message is returned.	For information about the behaviour in this case, see the second table in this topic.	If the owner of the source record has a manager, then the manager is the owner of the task. If the owner of the source record has no manager, then the behaviour is as follows: ■ For sales processes, the owner of the source record is the owner of the task. ■ For workflow actions, the task is not created and no error message is returned.
Manager of source record owner	Primary custom book	The task is not created. No error message is returned.	The task is not created. No error message is returned.	The task is not created. No error message is returned.
Manager of source record owner	No owner and no primary custom book	The task is not created. No error message is returned.	The task is not created. No error message is returned.	The task is not created. No error message is returned.
Team role or team user role	One or more team members have the role	The team member is the owner of the task. A task is generated for each team member who has the specified role.	If the team member has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task. If the team member does not have a default book, then the task is not created. No error message is returned.	The team member is the owner of the task. A task is generated for each team member who has the specified role.

Owner Option in Workflow Action or Sales Stage Task	Source Record: Owner or Primary Custom Book	Activity Record Type: User Mode	Activity Record Type: Book Mode	Activity Record Type: Mixed Mode
Team role or team user role	No team member has the role	For workflow actions, the task is not created and no error message is returned. For sales processes, if the source opportunity has an owner, then the opportunity owner is the owner of the task. If the source opportunity does not have an owner, then the task is not created and no error message is returned.	For workflow actions, the task is not created and no error message is returned. For sales processes, if the owner of the source opportunity has a default book, then the default book is assigned to the task. If the owner of the source opportunity does not have a default book, then the task is not created and no error message is returned.	For workflow actions, the task is not created and no error message is returned. For sales processes, if the source opportunity has an owner, then the opportunity owner is the owner of the task. If the source opportunity does not have an owner, then the task is not created and no error message is returned.
Specific user	Not applicable	The specified user is the owner of the task.	If the specified user has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task. If the specified user does not have a default book, then the task is not created. No error message is returned.	The specified user is the owner of the task.

The following table shows how Oracle CRM On Demand determines which owner or primary custom book to assign to a generated task in the following circumstances:

- The option in the Owner field on the sales stage task or workflow action is set to the manager of the source record owner
- The source record has an owner
- The Activity record type is configured in book mode

Owner Has a Manager	Manager Has a Default Custom Book That Can Contain Data	Owner Has a Default Custom Book That Can Contain Data	Sales Process Behaviour	Workflow Behaviour
Yes	Yes	Not applicable	Oracle CRM On	Oracle CRM On

Owner Has a Manager	Manager Has a Default Custom Book That Can Contain Data	Owner Has a Default Custom Book That Can Contain Data	Sales Process Behaviour	Workflow Behaviour
			Demand assigns the manager's default book as the primary book for the task.	Demand assigns the manager's default book as the primary book for the task.
Yes	No	Yes	Oracle CRM On Demand assigns the default book of the source record owner as the primary book for the task.	The task is not created. No error message is returned.
No	Not applicable	Yes	Oracle CRM On Demand assigns the default book of the source record owner as the primary book for the task.	The task is not created. No error message is returned.
No	Not applicable	No	The task is not created. No error message is returned.	The task is not created. No error message is returned.

About Importing Books and Book Assignments

You can import the following book-related records to Oracle CRM On Demand:

- **Books.** For information about importing book records, see Book Fields: Import Preparation (on page 638).
- **Book users.** You can import book user records to associate users with custom books. For information about importing book user records, see Book User Fields: Import Preparation (on page 636).
- **Account books.** You can import account book records to assign books to accounts. For information about importing account book records, see Account Book Fields: Import Preparation (on page 609).
- **Contact books.** You can import contact book records to assign books to contacts. For information about importing contact book records, see Contact Book Fields: Import Preparation (on page 650).

NOTE: To import account book or contact book records, your role must include the Manage Future Books privilege.

When you import records to assign books to accounts and contacts, you can specify a start date and an end date for each book assignment. You can also use the Future Primary Flag field to specify if the book that you assign to an account or contact is to become the primary book for that account or contact when the

assignment becomes active. For more information about time-based book assignments, see About Time-Based Book Assignments (on page 357).

Related Topics

See the following topics for related information:

- Scenario for Using Books to Manage Sales Territories (on page 360)
- Example of Using Books to Manage Sales Territories (on page 360)

About Time-Based Book Assignments

You can manage book assignments for accounts and contacts by importing account book records and contact book records. You can specify a start date and an end date for each book assignment that you import. If you do not specify a start date for a book assignment, then the assignment becomes active immediately. You can also use the Future Primary Flag field to specify if the book that you assign to an account or contact is to become the primary book for that account or contact when the book assignment becomes active.

NOTE: To import account book or contact book records, your role must include the Manage Future Books privilege.

Updates to Account and Contact Book Assignments

A book-assignment procedure runs periodically to examine all book assignments for accounts and contacts and to update the assignments as necessary. To determine when the book-assignment procedure is scheduled to run for your instance of Oracle CRM On Demand, contact Oracle CRM On Demand Customer Care.

The book-assignment procedure updates the book assignments for accounts and contacts as follows:

- **Activates book assignments.** If the start date of a book assignment has arrived and the assignment is not already active, then the assignment becomes active. When a book assignment becomes active, users who are members of that book have access to the account or contact through membership of that book.

  For example, you might import an account book record that assigns Book A to Account 1 with a start date of January 01 next year. The book assignment for Book A on Account 1 becomes active the first time that the book-assignment procedure runs after the start of January 01 next year.

- **Determines if a book is the primary book.** If the Future Primary Flag field is set to Y for a book assignment and the assignment is being activated, then the book becomes the primary book for the account or contact.

  For example, assume that Book A is currently the primary book for Account 1. You might import an account book record that assigns Book B to Account 1 with a start date of January 01 next year and with the Future Primary Flag field set to Y. The first time that the book-assignment procedure runs after the start of January 01 next year, the book assignment for Book B for Account 1 becomes active, and Book B becomes the primary book for Account 1. Book A is no longer the primary book for Account 1. However, the book assignment for Book A for Account 1 remains active unless the end date for the assignment is in the past when the book-assignment procedure runs.

- **Resolves conflicts if more than one book is specified as the primary book.** If multiple book assignments for an account or contact have the same start date and also have the Future Primary Flag field set to Y, then the following happens when the start date for the assignments arrives:

- All of the book assignments become active.
- The first book assignment that becomes active becomes the primary book for the record.
- If there is an existing primary book for the record, then that book is no longer the primary book for the record, but the book assignment remains active unless the end date for the book assignment is in the past.

For example, assume that Book A is currently the primary book for Account 1. You might import two account book records for Account 1. One of the records assigns Book B to Account 1 and the other assigns Book C to Account 1. Both assignments have the same start date of January 01 next year, and both assignments have the Future Primary Flag field set to Y. The first time that the book-assignment procedure runs after the start of January 01 next year, the assignments for Book B and Book C for Account 1 become active, and the assignment that is processed first becomes the primary book for Account 1. Book A is no longer the primary book for Account 1. However, the book assignment for Book A for Account 1 remains active unless the end date for the assignment is in the past when the book-assignment procedure runs.

- **Deactivates book assignments and removes primary books as necessary.** If the end date of a book assignment record is in the past, then the assignment becomes inactive and the book is removed from the record. In addition, if the book was the primary book for the account or contact, then the book is no longer the primary book for the account or contact.

  For example, assume that Book A is currently the primary book for Account 1. The end date of the book assignment is December 31 this year. The first time that the book-assignment script runs after the start of January 01 next year, the book assignment becomes inactive, and Book A is removed from the position of primary book for Account 1.

  When a book assignment becomes inactive, the relationship between the book and the account or contact is ended, and the book is removed from the account or contact. Users no longer have access to the account or contact through membership of that book. However, users who have access to the account or contact through another book or through other access-control components, such as team membership, can still access the record.

You cannot change the book-assignment procedure.

Example of a Time-Based Book Assignment

As an example of a time-based book assignment, consider the following: Book A is not currently assigned to Account 1. On December 01 of this year, you import an account book record that assigns Book A to Account 1. The book assignment has a start date of Jan 01 next year and an end date of Mar 31 of the same year. The book-assignment procedure activates and deactivates the book assignment as follows:

- Before the first time that the book-assignment procedure runs after the start of January 01 next year, the assignment of Book A to Account 1 is inactive, and Book A does not appear in the Books related information section of the detail page for Account 1.
- The first time that the book-assignment procedure runs after the start of January 01 next year, the book-assignment procedure activates the book assignment. When this happens, Book A appears in the Books related information section of the detail page for Account 1.
- The first time that the book-assignment procedure runs after the end of March 31 next year, the book-assignment procedure deactivates the book assignment. When this happens, Book A no longer appears in the Books related information section of the detail page for Account 1.

Restrictions When Specifying Start and End Dates for Book Assignments

When you specify the start and end dates for book assignments, note the following restrictions:

- If you specify both a start date and an end date, then the start date must be earlier than the end date.
- If you do not specify a start date, then the assignment becomes active at the time that it is added to Oracle CRM On Demand.
- If you do not specify an end date, then the book assignment remains active unless the book is removed from the record.
- If you specify an end date and do not specify a start date, then the book assignment becomes active immediately, and it remains active until the end date is reached or the book assignment is removed from the record, whichever comes first.

For example, you might import an account book record that assigns Book A to Account 1 and that has no start date and no end date. In this case, the book assignment becomes active immediately and is never made inactive by the book-assignment procedure because the book assignment does not have an end date. However, you can remove Book A from Account 1 through the user interface.

NOTE: An account can have multiple books assigned to it at the same time, with the same or different start dates and end dates for each book assignment. Similarly, a contact can have multiple books assigned to it at the same time, with the same or different start dates and end dates for each book assignment.

You can see the start and end dates in the book assignment details in the user interface in Oracle CRM On Demand, but you cannot change these dates in the user interface.

About Updating Existing Book Assignments

If you import a record to assign a book to an account or contact, and the book is already assigned to the account or contact, then the existing book assignment record in Oracle CRM On Demand is updated with the values from the imported record. You can also overwrite an existing value in the Start Date or End Date fields by importing a blank value. For example, assume that Book A is already assigned to Account 1. The assignment has a start date in the past and an end date in the future. You can import an account book record for Book A and Account 1 that has the same start date as the existing assignment but has no end date. In this case, the existing assignment is updated and the end date is removed.

Criteria for Updating Active Book Assignments

If an existing book assignment is already active, then the active periods for the existing assignment and the record that you import must overlap or be contiguous. The start and end dates of a record that you import to update an active book assignment must meet the following criteria:

- If the existing assignment has no end date, then the start date on the record that you import must not be a future date.
- The start date on the record that you import must not be more than 7 days later than the end date of the existing assignment.

If these criteria are not met, then the existing, active book assignment is not updated.

Criteria for Updating Future Book Assignments

If you import a record to assign a book to an account or contact, and there is already a book assignment record with a start date in the future for the same book and the same account or contact, then the end date of the assignment that you import must not be more than 7 days earlier than the start date of the existing assignment record. For example, if a record already exists to assign Book A to Account 1 on Feb 01 next year, and you want to change the start date of the assignment to January 01 next year, then the end date of the record that you import must not be earlier than January 25 next year. If the end date of the assignment record that you import is January 24 or earlier, then the import of the record fails and an error message is returned to indicate that the record already exists.

Related Topics

See the following topics for related information:

- About Importing Books and Book Assignments (on page 356)
- Scenario for Using Books to Manage Sales Territories (on page 360)
- Example of Using Books to Manage Sales Territories (on page 360)

Scenario for Using Books to Manage Sales Territories

This scenario gives one example of how your company might use custom books. In this scenario, custom books are used to manage sales territories. You might use the custom books functionality differently, depending on your business model.

Your company organises your accounts on a geographical basis and assigns groups of sales representatives to work with the accounts in each geographical area or territory. In addition, you might want to reassign sales representatives from one territory to another for various reasons. When such reassignments happen, you must realign the relationships between sales representatives and territories. Less frequently, an account relocates from one territory to another. When such a relocation happens, you must realign the relationships between accounts and territories. An example of configuring books, users, and accounts to support this scenario is given in Example of Using Books to Manage Sales Territories (on page 360).

Example of Using Books to Manage Sales Territories

This topic gives an example of using custom books to manage sales territories. You might use the custom books functionality differently, depending on your business model. The example in this topic supports the scenario described in Scenario for Using Books to Manage Sales Territories (on page 360).

To use books to manage sales territories

1. Create or import the custom books that you want to represent your sales territories.

   For information about creating books, see Creating Books and Book Hierarchies (on page 368). For information about importing books, see Book Fields: Import Preparation (on page 638).

2. Associate your sales representatives with the appropriate territory books.

You can associate users with books directly in Oracle CRM On Demand, or you can import book user records. For information about associating users with books, see Associating Users with Books (on page 370). For information about importing book user records, see Book User Fields: Import Preparation (on page 636).

3 Configure the Account record type in book mode.

For information about configuring record ownership modes, see Configuring Record Ownership Modes (on page 367).

4 Import the necessary account book records to assign the appropriate territory books to the accounts.

Use the start date on each account book record to specify the date when the assignment is to come into effect, that is, the date from which you want your sales representatives to have access to the account records in their territories. If you want, you can also specify the date when each book assignment is to end.

For more information about importing book assignment records, see the following topics:

- Account Book Fields: Import Preparation (on page 609)
- About Importing Books and Book Assignments (on page 356)
- About Time-Based Book Assignments (on page 357)

After you import the account book records and the book-assignment procedure activates the assignments on the specified start date, your sales representatives can access the records in their territories.

If sales representatives are reassigned from one territory to another, then you must realign the relationships between the sales representatives and the territories.

To realign the relationship between a sales representative and a territory

- Update the user record for the sales representative, as follows:
  - If the sales representative is assigned to a new territory, then add the territory book to the user record.
  - If the sales representative is no longer assigned to a territory, then remove the book from the user record.

  You can update the user record directly in Oracle CRM On Demand, or you can import book user records. For information about associating users with books, see Associating Users with Books (on page 370). For information about importing book user records, see Book User Fields: Import Preparation (on page 636).

If accounts relocate from one territory to another, then you must realign the relationships between the accounts and the territories.

To realign the relationship between an account and a territory

- Update the account record, as follows:
  - Add the new territory book to the account.
  - Remove the old territory book from the user record.

You can update the account record directly in Oracle CRM On Demand, or you can import account book records. For information about assigning records to books, see Assigning Records to Books (on page 378). For information about importing account book records, see Account Book Fields: Import Preparation (on page 609).

Process of Setting Up Books

To set up books for your company, perform the following tasks:

1. Contact Oracle CRM On Demand Customer Care, and ask to have the book functionality turned on for your company.

   When Oracle CRM On Demand Customer Care turns on the book functionality for your company, several controls become available to you in Oracle CRM On Demand. For information about verifying that these controls are available, and that the Administrator role has been set up to use books, see Verifying Book Set-up for the Administrator Role (on page 363).

2. Design your book structure.

   For guidelines about designing your book structure, see About Designing Book Structures (on page 342).

3. (Optional) Create book types and book user roles.

   For more information, see Creating Book Types and Book User Roles (on page 366).

4. (Optional) Configure the record ownership mode for record types.

   For more information, see About Record Ownership Modes (on page 346) and Configuring Record Ownership Modes (on page 367).

5. Create the books and the book hierarchies.

   For more information, see Creating Books and Book Hierarchies (on page 368).

6. Associate users with books.

   For more information, see Associating Users with Books (on page 370).

7. Enable books for your company.

   For more information, see Enabling Books for Your Company (on page 374).

8. Enable books for users and user roles.

   For more information, see Enabling Books for Users and User Roles (on page 375).

Related Topics

See the following topics for related information about books and book structures:

- Book Management (on page 338)
- About Web Services Support for Books (on page 346)

- About Importing Books and Book Assignments (on page 356)
- About Time-Based Book Assignments (on page 357)
- Scenario for Using Books to Manage Sales Territories (on page 360)
- Example of Using Books to Manage Sales Territories (on page 360)
- Adding Books to Record Detail Page Layouts (on page 377)
- Assigning Records to Books (on page 378)
- Book Hierarchy Page (on page 380)
- Book Fields (on page 381)

Verifying Book Set-up for the Administrator Role

To turn on the book functionality for your company, Customer Care does the following:

- Grants the Manage Books privilege and access to books to the administrator's role
- Sets up the access profile for the administrator to allow access to books

The following procedure describes how to verify that the administrator's role is set up for books.

To verify that the administrator's role is set up for books

1. Sign in to Oracle CRM On Demand as a user with the Administrator role.
2. In the upper-right corner of any page, click the Admin global link.
3. In the User Management and Access Controls section of the Admin Homepage, click the User Management and Access Controls link.
4. In the Role Management section, click the Role Management link.
5. From the Translation Language list, select your company's primary language.
6. Click the Edit link for the Administrator role.
7. In the Role Management Wizard, go to Step 2, Record Type Access, and verify that the access to book records is as shown in the following table.

   The following table shows the book record access that is required for the Administrator role.

Record Type	Has Access?	Can Create?	Can Read All Records?
Books	Selected	Selected	Selected

8. Go to Step 4, Privileges, and verify that the Manage Books privilege is selected.

   The following table describes the Manage Books privilege.

Category	Privilege	Description
Admin: Users and Access Controls	Manage Books	Manages Book access, assigns data in bulk to Books, and defines Book related workflows

NOTE: A user whose role has the Manage Books privilege as well as the Manage Roles and Access privilege, can grant the Manage Books privilege to other user roles. As with most administration tasks, it is recommended that the privilege to manage books is granted to company administrators only.

9 Navigate back to the User Management and Access Controls page.

10 In the Access Profile Management section, click the Access Profiles link.

11 From the Translation Language drop-down list, select your company's primary language.

12 Verify that the settings for the access profiles are correct, as follows:

a Click the Edit link for the Administrator Default Access Profile, and verify that the settings match those shown in the following table.

b Click the Edit link for the Administrator Owner Access Profile, and verify that the settings match those shown in the following table.

The following table shows the required settings that allow users with the Administrator role to manage books in Oracle CRM On Demand.

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Account	Books	Full	Full
Accreditation*	Books	Full	Full
Activity	Books	Full	Full
Allocation*	Books	Full	Full
Application*	Books	Full	Full
Books	Not applicable	Read/Edit/Delete	Read/Edit/Delete
Books	Sub-Books	View	View
Books	User	Full	Full
Business Plan*	Books	Full	Full
Campaign	Books	Full	Full
Certification*	Books	Full	Full
Contact	Books	Full	Full
Course*	Books	Full	Full

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Custom Objects	Books	Full	Full
Deal Registration*	Books	Full	Full
Dealer*	Books	Full	Full
Event*	Books	Full	Full
Exam*	Books	Full	Full
Financial Account*	Books	Full	Full
Financial Plan*	Books	Full	Full
Fund*	Books	Full	Full
Household*	Books	Full	Full
Inventory Audit Report*	Books	Full	Full
Inventory Period*	Books	Full	Full
Lead	Books	Full	Full
MDF Requests*	Books	Full	Full
Messaging Plan*	Books	Full	Full
Objective*	Books	Full	Full
Opportunity	Books	Full	Full
Partner*	Books	Full	Full
Policy*	Books	Full	Full
Portfolio*	Books	Full	Full
Programme*	Books	Full	Full
Sample Lot*	Books	Full	Full
Sample Transaction*	Books	Full	Full
Service Request	Books	Full	Full
Smart Call*	Books	Full	Full
Solution	Books	Full	Full
Vehicle*	Books	Full	Full

NOTE: Record types marked with an asterisk (*) are not available in the standard edition of Oracle CRM On Demand. The access settings for these record types are relevant only if the record types are available.

The following table describes the controls that are enabled by the Manage Books privilege. You can access each component to verify that all of the necessary controls are available to you.

Component	Controls Enabled by the Manage Books Privilege
Admin Homepage	■ In the User Management and Access Controls section, the Book Management link is available. From this link, you can access the Book Hierarchy page, where you can create, update, and manage books. ■ In the Data Management Tools section, the Batch Assign Book Queue link is available. From this link, you can access the Batch Assign Book Queue page, where details of active and completed requests for batch book assignments are displayed.
Application Customisation page	■ In the Record Type Set-up section, the Book link is available. From this link, you can access the Book Application Customisation page, where you can set up book fields and book user fields, including the picklist values for the Book Type and Book User Role fields.
Role Management Wizard	■ In Step 2, Record Type Access, the Book option appears as a line item. ■ In Step 4, Privileges, the Manage Books privilege appears as an option.

Access Profile Wizard	■ In Step 1, Access Profile Name, the Grantable to Book Users check box appears.
	■ In Step 2, Specify Access Levels:
	  ■ The Book option appears as a top-level object.
	  ■ A line item for the Book related information section appears under the Related Information link for record types that support books.

Company Profile Page	■ In the Company Data Visibility Settings section of the page, the Enable Books check box appears.
Page Layout Wizard (Layout Management)	■ In Step 4, Related Information, the Book related information section appears in the Available section of the page for all record types that support books.
Rename Record Types Page	■ The Book option appears as one of the items on the page.
Workflow	■ The Assign a Book action appears as an available option (if your role has the Manage Data Rules - Manage Workflow Rules privilege enabled).
Menu on List page	■ Batch Assign Book appears as one of the menu options for supported record types.

Creating Book Types and Book User Roles

To help you to organise your book structure, you can create book types, and then assign a type to each book that you create. For example, if you plan to have a book hierarchy for territories, you can create a book type

called Territory. The Book Type field is an editable picklist field that you can customise to meet your company's needs.

You can also create book user roles that you can assign to users when you associate them with books. Book user roles are not the same as Oracle CRM On Demand user roles. For example, you can create book user roles, such as Territory User and Territory Manager, to be assigned to users who work with the territories book hierarchy.

The following procedure describes how to create book types and book user roles.

To create book types and book user roles

1. In the upper-right corner of any page, click the Admin global link.
2. Click the Application Customisation link.
3. In the Record Types Setup section, click Book.
4. In the Book Application Customisation page, do one of the following:
   - To create book types, click Book Field Setup.
   - To create book user roles, click Book Users Field Setup.
5. Click the Edit Picklist link for the field.
6. Enter the values for the picklist, and save your changes.

For more information about editing picklist fields, see Changing Picklist Values (on page 158).

Configuring Record Ownership Modes

Oracle CRM On Demand allows you to set up the following modes of record ownership to support your business needs:

- User mode
- Book mode
- Mixed mode

For more information about the modes of record ownership, see About Record Ownership Modes (on page 346).

To configure record ownership mode

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customisation section, click the Application Customisation link.
3. In the Record Types Set-up section, click the link for the record type that you want to configure.

4 In the Field Management section, click *record type* Field Set-up, where *record type* is the name of the record type that you want to configure.

5 Depending on the record ownership mode that you want to configure, edit the fields as follows:

- To configure the record type in user mode, configure the Owner field so that it is a required field, and then configure the Book field so that it is not a required field.
- To configure the record type in book mode, configure the Book field so that it is a required field, and then configure the Owner field so that it is not a required field.
- To configure the record type in mixed mode, configure both the Owner field and the Book field so that they are not required fields.

6 Save your changes.

For more information about editing fields, see Creating and Editing Fields (on page 125).

NOTE: After you configure the record ownership mode, you must make sure that the page layouts for the record type are set up correctly for the record ownership mode. For more information about page layouts for record ownership modes, see About Field Set-up and Page Layouts for Record Ownership Modes (on page 112).

Creating Books and Book Hierarchies

You create books from the User Management and Access Controls section of the Admin Homepage.

NOTE: You can also create books by importing book records. For more information, see Book Fields: Import Preparation (on page 638).

Before you begin:

- To perform this procedure, you must have the Manage Books privilege in your user role.
- Before you start to create your books and book hierarchies, read the topic About Designing Book Structures (on page 342).

NOTE: Oracle CRM On Demand generates audit records of all changes to books. If your user role includes the Access Master Audit Trail and Admin Configuration Audit privilege, then you can view the audit trail of the changes to books. For more information about viewing the audit trail, see Reviewing the Audit Trail for Administration Configuration Changes (on page 81).

The following procedure describes how to create a book.

To create a book

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

2 In the User Management and Access Controls section of the Admin Homepage, click the Book Management link.

3 On the Book Hierarchy page, click New.

4 On the Book Edit page, enter the required information, and then save your record.

The following table describes the information you must enter for the book.

Field	Description
Book Name	For display purposes in the Book selector, the recommended maximum length of a book name is 60 characters.
Book Type	(Optional) Select the book type from the picklist.
Parent Book	■ If this is a root book, leave this field blank. ■ If this is a subbook, click the Lookup icon next to the Parent Book field, and select the parent book.
Can Contain Data	Applies to the current book only, not to any subbooks. Select this check box if records will be associated with this book. For performance reasons, apply this feature only to books that contain data. **NOTE:** In the Book selector, which appears throughout Oracle CRM On Demand, custom books containing data are identified by a blue document icon. Custom books that cannot contain data are identified by a yellow folder icon.

Creating Subbooks

If you want to create subbooks for an existing parent book, you can create the subbooks using the method in the previous procedure, or you can create subbooks as described in the following procedure.

To create subbooks for an existing book

1. On the Book Hierarchy page, click the link for the parent book.
2. On the Book Details page, click New in the Sub-Books title bar.
3. On the Book Edit page, enter the information for the book, and save your changes.

Moving a Book to a New Parent Book

You can change a book to make it a subbook of another book, or you can move a subbook from one parent book to another. When you change the parent of a book, the book hierarchy changes as follows:

- The new parent applies to the current book and any subbooks that are children of the current book.
- Any users assigned to the old parent book lose access to the current book and its subbooks.
- Any users assigned to the new parent book gain access to the current book and its subbooks.
- Any users assigned directly to the current book are unaffected by the change in the parent book.

NOTE: If you want to delete a parent book, you must first remove all its subbooks, users, and data. After you delete a book, the book is stored for 30 days in the Deleted Items area. During that time, you can restore the book. However, after 30 days, the book is permanently purged, and you cannot retrieve it. For information on deleting and restoring records, see Deleting and Restoring Records.

TIP: To find out how many records a specific book contains, create a historical report for each record type. For information about creating reports, see Working with the Analytics Homepage.

The following procedure describes how to move a book to a new parent book.

To move a book to a new parent book

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section of the Admin Homepage, click the Book Management link.
3. On the Book Hierarchy page, click the Edit link for the book that you want to change.
4. Click the Lookup icon next to the Parent Book field, and select the new parent book.
5. Save your changes.

Associating Users with Books

You can define which users can access a book, and the level of access that each user has to records in the book. When you associate a user with a book, you specify the access profile for the user when working in the book. The following standard options are available:

- **Edit.** Allows the user to read and update the records in the book.
- **Full.** Allows the user to read, edit, and delete the records in the book.
- **Read-Only.** Allows the user to view the records in the book.

You can also create custom access profiles for books. The Access Profiles picklist on the Book Users Edit page includes all access profiles that have the Grantable to Book Users option selected on them. For information on how to create custom access profiles for books, see Creating Access Profiles for Books (on page 373).

The level of access that a user has to books affects the user's overall access rights to records. The following examples show how the user's access rights are determined.

Example 1

Ryan Taylor, a sales representative, has the following set-up in Oracle CRM On Demand:

- Has access to account records through the sales representative role.
- Has the access level on his owner access profile set to Read-Only for the account record type
- Has the access level on his default access profile set to Read-Only for the account record type
- Is not a member of the account team for the ABC Widgets account
- Is associated with the Widget Makers book, with his access profile for the book set to Full

If the ABC Widgets account is in the Widget Makers book, Ryan's access rights to the ABC Widgets record allow him to read, edit, and delete the record. He has these access rights, because the access control system in Oracle CRM On Demand calculates the most liberal rights from all of the relevant access profiles and applies

them. In this case, the access profile for the book is set to Full, and therefore supersedes the access profile for account records.

Example 2

Tanya Lee, a sales representative has the following set-up in Oracle CRM On Demand:

- Has access to opportunity records through the sales representative role.
- Has the access level on her owner access profile set to Read-Only for the opportunity record type
- Has the access level on her default access profile set to Read-Only for the opportunity record type
- Is a member of the opportunity team with the Opportunity Access field set to Edit
- Is associated with the Widget Makers book, with her access profile for the book set to Full

If an opportunity is in the Widget Makers book, Tanya's access rights allow her to read, edit, and delete the record. However, if an opportunity is not in the Widget Makers book, Tanya's access rights (from her owner access profile, her default access profile, and her membership of the opportunity team) allow her to read and edit the opportunity, but she cannot delete the opportunity.

Methods of Associating Users with Books

You can use three methods to associate users with books:

- From a book record, you can associate multiple users with the book.
- From a user record, you can associate multiple books with the user.
- You can import book user records. For more information, see Book User Fields: Import Preparation (on page 636).

The following procedure describes how to associate multiple users with a book through the book record.

To associate multiple users with a book

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the Book Management link.
3. On the Book Hierarchy page, click the name link of the book with which you want to associate users.
4. On the Book Details page, on the title bar of the Book Users section, click Add Users.
5. In the Book Users Edit page, pick the users whom you want to associate with the book.

   The following table describes the information that you must specify for each user you associate with the book.

Field	Description
Users	Click the Lookup icon next to the User field and then select the user. **NOTE:** A user's delegates do not automatically get access to a user's

Field	Description
	book. You must also associate each delegate with the book.
Book User Role	(Optional) Select the role from the picklist. **NOTE:** The book user role is not an Oracle CRM On Demand role. For information about creating book user roles, see Creating Book Types and Book User Roles (on page 366).
Access Profile	From the list of profiles that are enabled for books, select the access profile that determines the user's access rights to the current book and any subbooks. The standard options are: ■ **Edit.** Allows the user to read and update the records in the book. ■ **Full.** Allows the user to read, edit, and delete the records in the book. ■ **Read-Only.** Allows the user to view the records in the book. **NOTE:** For information about creating custom access profiles for books, see Creating Access Profiles for Books (on page 373).

The following procedure describes how to associate multiple books with a user through the user record.

To associate multiple books with a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the User and Group Management section, click the User Management link.
4. In the User List, click the last name of the user with whom you want to associate books.
5. On the User Detail page, on the title bar of the Assigned Books section, click Add Books.

   NOTE: If the Assigned Books section is not available on the User Detail page, click the Edit Layout link, and add the section to the page layout.
6. On the Assigned Books Edit page, pick the books that you want to associate with the user, and specify the user information for each book.

   The following table describes the information that you must specify for each book that you associate with the user.

Field	Description
Book Name	Click the icon to the right of the Book Name field, pick a book in the Book selector, and click OK.

Field	Description
Book User Role	(Optional) Select the role from the picklist. **NOTE:** The book user role is not an Oracle CRM On Demand role. For information about creating book user roles, see Creating Book Types and Book User Roles (on page 366).
Access Profile	From the list of profiles that is enabled for books, select the access profile that determines the user's access rights to the current book and any subbooks. The standard options are: ■ **Edit.** Allows the user to read and update the records in the book. ■ **Full.** Allows the user to read, edit, and delete the records in the book. ■ **Read-Only.** Allows the user to view the records in the book. **NOTE:** For information about creating custom access profiles for books, see Creating Access Profiles for Books (on page 373).

NOTE: Associating a user with a book does not allow the user to access the book. To allow users to access books, you must enable books for each user, and each user role that wants access to books, as described in Enabling Books for Users and User Roles (on page 375).

Creating Access Profiles for Books

When you associate a user with a book, you select an access profile that determines the user's access rights to records in the book and in any subbooks. The access profile for the book is evaluated with all of the other access profiles for the user, and the user is given the most liberal access rights to a record that the access profiles permit. For more information about how the access profiles interact, see Associating Users with Books (on page 370).

The standard access profiles available for selection when associating a user with a book are as follows:

- **Edit.** Allows the user to read and update the records in the book.
- **Full.** Allows the user to read, edit, and delete the records in the book.
- **Read-Only.** Allows the user to view the records in the book.

You can also create custom access profiles for books. The Access Profiles picklist, which appears on the Book Users Edit page and on the Assigned Books Edit page, includes all access profiles that have the Grantable to Book Users option selected.

The following procedure describes how to create an access profile for books.

To create an access profile for books

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.

3 In the Access Profile Management section, click the Access Profiles link.

4 Create a new access profile, or edit an existing access profile.

5 In Step 1 of the Access Profile wizard, select the Grantable to Book Users check box.

6 In Step 2, Specify Access Levels, specify the levels of access for each record type and for the related information types.

7 When you finish creating or editing the Access Profile, click Finish to save your changes.

Enabling Books for Your Company

When you have set up your book structures, you can enable books for your company. The following procedure describes how to enable books for your company.

To enable books for your company

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

2 In the Company Administration section, click the Company Administration link.

3 In the Company Profile section, click the Company Profile link.

4 On the Company Profile page, set the following options. For more information about these options, see Setting Up Your Company Profile and Global Defaults (on page 19).

a In the Company Settings section, ensure that the Global Search Method is set to Targeted Search. When Targeted Search is selected, the Book selector appears in the search section of the Action bar.

b In the Analytics Visibility Setting section, set the Historical Subject Areas option to Full Visibility. (This setting ensures that the data in books is synchronised with the data in the database that supports reports and dashboards.)

c In the Company Data Visibility Settings section, ensure that the following checkboxes are selected:

Setting	Purpose
Enable Books	Use this field to control whether the Book selector displays custom books and user books. If the Enable Books check box is deselected, the Book selector displays only user books and books for delegates if delegates exist. **NOTE**: To see the Enable Books option in the Company Profile page, you must have the Manage Books privilege in your user role. **CAUTION:** You cannot deselect this check box after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.

Setting	Purpose
Display Book Selector	Enables the Book selector that users can use to filter records by user, delegate, or custom book.

Enabling Books for Users and User Roles

To enable a user to use books, you configure the user's role and the default access profile for the user's role. You also configure the user record for each user.

The following procedure describes how to enable books for a user role. You must perform these steps for each role that uses books.

To enable books for a user role

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the Role Management section, click the Role Management link.
4. From the Translation Language list, select your company's primary language.
5. Click the link for the role that you want to modify.
6. In the Role Management Wizard, go to Step 2, Record Type Access, and configure the access levels for the Books record type.

   The following table shows the settings you must configure to allow users (who are not administrators) to access books.

Record Type	Has Access?	Can Create?	Can Read All Records?
Books	Selected	Deselected	Deselected

   NOTE: You must ensure that the Can Read All Records check box is deselected. Otherwise, the user can access all books in the Book Hierarchy list page.
7. Click Finish to save your changes.
8. Navigate to the User Management and Access Controls page.
9. In the Access Profile Management section, click Access Profiles.
10. From the Translation Language list, select your company's primary language.
11. Click the Edit link for the Default Access Profile that is used for the user role you are enabling for books, and configure the settings to provide access to books and related record types.

The following table describes the required settings on the Default Access Profile for a user role, which enable access to books for the role. Configuring the default access profile gives the user role the necessary access to books. Therefore, you do not have to configure the owner access profile for the role.

Record Type	Related Record	Default Access Profile
Books	Not applicable	ReadOnly.
Books	Sub Book	View. This profile allows the user to see all subbooks in the Book Detail page. The default is No Access.
Books	User	Read-Only. This profile allows the user to see all other users who are associated with the book in the Book Detail page. The default is No Access.

12 Click Finish to save your changes.

The following procedure describes how to enable books for a user. You must perform these steps for each user who uses books.

To enable books for a user

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

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

3 In the User Management section, click the User Management link.

4 Click the Edit link for the user whose profile you want to modify.

5 In the Key User Information section of the User Edit page, configure the following settings:

- **Default Book for Analytics.** This setting determines the user book or custom book that appears by default for the user in the Book selector in the Analytics pages. The setting displays the user name and sign in ID (by default) of the user whose record you are editing. Change the setting of the record to the custom book or user book where the user most frequently works for reports and dashboards. The setting on the user record does not limit the user's access to data: the user can select a different book or user in the Book selector.
- **Default Book.** This setting determines the user book or custom book that appears by default for the user in the Book selector when working in any area other than the Analytics pages. The setting

displays All by default. Change the setting to the custom book or user book where the user most frequently works, so that the user does not have to select the book each time the user wants to work on data in the book. The setting on the user record does not limit the user's access to records: the user can select a different book or user in the Book selector.

6 In the User Security Information section of the User Edit page:

   a Set the value for Reporting Subject Areas to either Manager Visibility or Team Visibility.

   NOTE: You must select one of these values. Otherwise, reports will not contain any data. The option that you select, Manager Visibility or Team Visibility, does not affect the data in the report.

   b Set the value for Historical Subject Areas to Full Visibility.

7 Click Save.

NOTE: To access a book, the user must be associated with the book. In addition, a user's delegates do not automatically have access to a user's books. The delegates must also be associated with the books.

Adding Books to Record Detail Page Layouts

To make the Books related information section available for users on the detail page for a record type, you must configure the following:

- Make the Books related information section available in the record type page layout for the user role.

  NOTE: You can optionally create custom layouts for the Books related information section for each of the record types that support books. For example, you can create a custom layout for the Books related information section for the Account Detail pages through the Application Customisation page for the Account record type. For information about creating custom layouts for related information sections, see Customising Related Item Layouts (on page 161).

- On the access profile for the user role, give the user role access to Books as a related information section on the record type.

The following procedure describes how to make the Books related information section available in a record type page layout.

To make the Books related information section available in a record type page layout

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

2 Click the Application Customisation link.

3 In the Record Type Set-up section, click the link for the required record type.

   For example, if you want to make the Books related information available on the Opportunity Detail page, click the Opportunity link.

4 In the Page Layout section, click the required Page Layout link (for example, Opportunity Page Layout).

5 In the record type Page Layout page, click the Edit link for the page layout where you want to make the Book related information section available.

6 In the Page Layout wizard, go to Step 4, Related Information, and click the arrows to move the Books item to the Displayed section.

7 (Optional) In the Page Layout wizard, go to Step 5, Related Information Layout, and select the layout that you want to use for the Books related information section.

8 Click Finish to save your changes.

9 Sign out of Oracle CRM On Demand, and then sign in again.

The following procedure describes how to give a user role access to Books as a related information section on the record type.

To give a user role access to Books as a related information section on a record type

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

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

3 In the Access Profile Management section, click Access Profiles.

4 Click the Edit link for the Default Access Profile that is used for the user role where you want to make the Books related information section available.

5 In the Access Profile wizard, go to Step 2, Specify Access Levels, and click the Related Information link for the record type where you want to make the Books related information section available.

   For example, if you want to make the Books related information available on the Opportunity Detail page, click the Related Information link beside the Opportunity record.

6 Select the access level for Books according to the requirements of the user role.

7 Click Finish to save your changes.

8 Repeat steps 4 through 7 for the Owner Access Profile that is used for the user role you are enabling for books.

Assigning Records to Books

You can assign records to custom books in the following ways:

- **One record at a time (manually).** You can select the book value on the record Detail page.
- **In bulk.** You can batch assign records to books.

- **By importing book assignments.** You can import book assignments for accounts and contacts only. For information about importing book assignments, see About Importing Books and Book Assignments (on page 356).

Records can also be assigned to books using active workflow rules and conditions. For information about using workflow rules, see About Workflow Rules (on page 423).

About the Start Date and End Date for Book Assignments on Accounts and Contacts

Book assignments for account and contact records can have a start date and an end date. You can update these fields by using the import assistant or Web services only. You must use the Web Services v1.0 API for all such Web services requests.

A book assignment remains effective until the end date is reached or until the book assignment is removed from the record, whichever comes first. When the end date is reached, the relationship between the book and the record is terminated, and users no longer have access to the record through membership of the book. However, users who have access to the record through other access-control components, such as record ownership or team membership, can still access the record.

For more information about managing time-based book assignments, see About Time-Based Book Assignments (on page 357).

Before you begin:

- To assign records to books on a record Detail page, the Detail page layout for the record type must include the Book section.
- To batch assign records to books, you must have the Manage Books privilege in your user role.

The following procedure describes how to assign a single record to a book.

To assign a single record to a book

1. Navigate to the Detail page for the record.
2. On the title bar of the Books section of the Detail page, click Add.
3. In the book selector, choose the book to which you want to assign the record and click OK.

The following procedure describes how to batch assign records to books.

To batch assign records to books

1. In the list window, click the Menu button on the title bar, then click Batch Assign Book.
2. In the Batch Assign Book window, click the selector button beside the Target Book box, then in the Book lookup, choose the book to which you want to assign records.
3. Choose an Assignment Option for the records in the list.

   The following table describes the Assignment Options that you can select.

Option	Description
Add	Adds the Target Book to all records. This assignment does not affect any previous book assignment for the records.
Replace Type	Adds the Target Book to all records and removes any previously assigned books that have the same type as the Target Book. **NOTE:** Book Types are defined by your company administrator.
Replace All	Adds the Target Book to all records and removes all previously assigned books, regardless of type.
Replace Book	Specifies the book that you want to replace. Reassigns records from the book you specify here to the Target Book. Other records are not affected.
Remove	Removes the existing assignment to the Target Book from all records.
Remove All	Removes all assigned books from the records.

4 If you choose any option other than Add in step 3, you must now choose an Apply To option.

The following table describes the Apply To options that you can select.

Option	Description
Manual Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made manually
Automatic Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made by workflow or batch
Both	Applies the Assignment Option to all selected records

5 To apply your chosen assignment criteria, click Assign.

The Batch Assign Book Queue window opens, showing your assignment request in the Active Requests section. For more information, see Batch Assign Book Queue Page (on page 799).

When your request has been processed, you will be notified by email.

Book Hierarchy Page

The Book Hierarchy page shows information about custom books. You can view subsets of books or view all books.

The following table describes the tasks that you can perform from the Book Hierarchy page.

To do this	Follow these steps
View a different subset of books	On the Book Hierarchy title bar, click the list and change the selection to a different subset of books, or select All Books to view all books.
Create a book	On the Book Hierarchy title bar, click New. In the Book Edit page, enter the required information, and save the record.
Create a subbook for an existing book	Click the name link for the parent book. On the Book Details page, click New in the Sub-Books title bar. On the Book Edit page, enter the information for the book, and save your changes.
Move a book to a new parent book	Click the Edit link for the book that you want to change. In the Book Edit page, click the Lookup icon next to the Parent Book field, select the new parent book, and then save your changes.
Associate users with a book	Click the name link of the book. On the Book Details page, click Add Users in the Book Users title bar. On the Book Edit page, pick the users whom you want to associate with the book, and specify the user information. For more information, see Associating Users with Books (on page 370).

Book Fields

The Book Edit page and the Book Detail page show details of custom books. You can change the details of a book, add subbooks to a book, and add users to a book.

The following table provides additional information regarding some fields.

Field	Description
Key Book Information	
Book Name	The name given to the book.
Parent Book	Shows the name of the parent book if the book is a subbook. If the book is a root book, this field is blank.
Book Type	Books can be assigned a book type to help organise book structures. For information about creating book types, see Creating Book Types and Book User Roles (on page 366).
Can Contain Data	Indicates if records can be associated with this book. For performance reasons, books that do not contain data must not have this check box selected.

Field	Description
Partner	Specific to Oracle CRM On Demand for Partner Relationship Management. For more information, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide* in the Oracle CRM On Demand documentation library (see Oracle CRM On Demand documentation library - http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html) on Oracle Technology Network.
Partner Location	Specific to Oracle CRM On Demand for Partner Relationship Management. For more information, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide* in the Oracle CRM On Demand documentation library (see Oracle CRM On Demand documentation library - http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html) on Oracle Technology Network.
Sub-Books Section	
Book Name	The name of a book that is a subbook of the current book.
Book Type	The book type of the subbook.
Can Contain Data	Indicates if records can be associated with the subbook.
Book Users Section	
Last Name	The last name of a user associated with this book.
First Name	The first name of a user associated with this book.
Book User Role	The user's book role for the current book. A book user role can be assigned to a user when the user is associated with a book. Book user roles are not user roles in Oracle CRM On Demand. For information about creating book user roles, see Creating Book Types and Book User Roles (on page 366).
Access Profile	The user's access rights to the current book and any subbooks. Select from the list of profiles that are enabled for books. For information about creating access profiles specifically for books, see Creating Access Profiles for Books (on page 373).

Information about Troubleshooting Books

For more information about troubleshooting book functionality, see 1800338.1 (Article ID) on My Oracle Support.

Group Management

Group Management is an optional feature that gives your company the ability to set up teams of people who work together, allowing them to share a common set of information.

Setting up groups at your company allows users to perform the following:

- Group members can access group calendars and task lists, as follows:
  - Any appointment that is owned by a member of a group or has a member of the group on the activity team is visible to all members of the group in the merged calendar in the Group tab in the daily, weekly, and monthly calendar views, unless the appointment is marked as private. The merged calendar shows the availability for all members in the group, and allows employees to determine the best time to schedule appointments and to notify employees (and contacts) of appointments. Group members can also view the individual calendars of other members of the group, in the User tab in the Calendar page.

    NOTE: Users must have the Share Calendar privilege assigned to their role to be able to access the merged group calendar. Users who have the Share Calendar privilege can also set up custom calendar views. For more information, see Viewing the Calendars of Other Users and Adding Custom Calendar Views.

  - Any task that is owned by a member of a group or has a member of the group on the activity team is visible to all members of the group in the task lists in the Group Tasks tab in the Calendar page, unless the task is marked as private.
- Group members can share ownership of the following record types automatically:
  - Account
  - Contact
  - Household
  - Opportunity
  - Portfolio

  When a record of any of these record types is assigned to a member of a group, all members of the group become joint owners of the record.

  NOTE: If a contact is marked as private, then the details of the contact record cannot be read by other group members.

  For example, if a user belongs to group XYZ, then any account that is assigned to the user after the user becomes a member of the group is included in the account lists for all members of group XYZ. On such records, the group name appears in the Primary Group field if this field is present on the Detail page layout. All of the members of the group, including the designated owner of the record, appear in the Team related information section on the record Detail page. All members of the group can update the record.

  By default, the current group's members have full access to group records that were assigned to a group member after the member joined the group.

  NOTE: For this functionality to work, the Default Group Assignment option in the Company Profile page must be selected. The option must be selected before the groups are created. For more information, see Setting Up Groups (on page 386).

This behaviour applies to groups:

- Each user can only belong to one group.

  After a user is added to a group, his or her name no longer appears on the user list when selecting group members.

- If you select the group assignment option at your company:

  - Records that exist before a group is defined are not updated unless the Owner field is updated with a new owner belonging to a group.

  - When a user joins a group, the user gains access to the group's records. However, records owned by the new group member prior to the user joining the group are not automatically visible to the existing group members. If a user becomes the owner of records after the user is added to a group, the new records are visible to other group members.

    The following example illustrates group record ownership:

    - User 1 and User 2 belong to Group 1. User 3 does not belong to Group 1.
    - User 3 owns Account 31. User 1 and User 2 will not have access to Account 31.
    - User 3 is added to Group 1. User 1 and User 2 will still not have access to Account 31.
    - User 3 becomes owner of Account 32. User 1 and User 2 will have access to Account 32.

- If users are deleted from a group, they are removed from all shared records that the group owns. They retain access to their private records.

  NOTE: If the name of the user who is deleted from the group appears in the Owner field on a shared record that the group owns, then the name in the Owner field on that record is changed to the name of another member of the group after the previous owner is deleted from the group. When such a change is made to the ownership of an opportunity record or a portfolio record, the system fields that store information about the most recent change to the record are updated, and the information shows that the record was updated by the Oracle Administrator user. However, in the case of the other record types that support groups, the system fields are not updated. For all record types that support groups, the change to the Owner field on the shared record is not tracked in the audit trail when the field is changed as a result of the user being deleted from the group, even if the Owner field is set up to be audited for the record type.

About Groups and Record Ownership Modes

Depending on the record ownership mode that you set up for a record type, records of that type might not have an owner. A record might instead have a primary custom book or might have no owner or primary custom book. For more information about record ownership modes, see About Record Ownership Modes (on page 346). Record ownership modes apply only to record types that support books.

If you change the record ownership mode for a record type, then a record that previously had an owner might have the owner removed from the record when the record is updated for the first time after the ownership mode changes. In this case, if the former owner of the record is a member of a group, then all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a group, then all of the members of the group are removed from the team.

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

retain the former owner as a member of the team, see Customising Previous Ownership for Shared Records (on page 261).

Groups and Teams

Oracle CRM On Demand distinguishes between *Groups* and *Teams*:

- Groups are set up by the company administrator and apply to entire sets of records across the company. The Group feature must be enabled by Customer Care or by the company administrator when the company is set up for Oracle CRM On Demand.
- The record owners or company administrators set up teams. Teams apply to only those record types that allow teams, including:
  - Account
  - Accreditation
  - Activity
  - Application
  - Business Plan
  - Certification
  - Contact
  - Course
  - Custom Objects
  - Deal Registration
  - Event
  - Exam
  - Household
  - Lead
  - MDF Request
  - Objective
  - Opportunity
  - Order
  - Partner
  - Portfolio
  - Sample Request
  - Service Request
  - Special Pricing Request

To set up a team to access the record, the owner must explicitly share that record using the Team section on the record Detail page. For activity records, the record owner adds users to the activity team in the Users related information section in the activity Detail page.

For information on setting up groups, see Setting Up Groups (on page 386).

Related Topics

See the following topics for related information about groups and sharing calendars:

- Viewing the Calendars of Other Users
- Adding Custom Calendar Views

Setting Up Groups

Before you begin. Do the following:

- Make sure your role includes the appropriate privileges, as follows:
  - To create, edit, or delete a group, your user role must include the Manage Roles and Access privilege.
  - To add users to a group or remove users from a group, your user role must include both the Manage Roles and Access privilege and the Manage Users privilege.
  - To turn the Default Group Assignment feature on or off, your role must include the Manage Company privilege.
- To understand how groups work, see Group Management (on page 383).

Sequence for Setting Up Groups and Importing Users

When setting up groups, follow this sequence:

1. Turn on the Default Group Assignment feature.

   CAUTION: Before you set up or change a group, the Default Group Assignment feature must be turned on (that is, the Default Group Assignment option in the Company Profile page must be selected), even if you do not plan to use the default group assignment functionality. If you do not turn on this feature before you set up or change a group, the group will not perform correctly. If that happens, you must delete the group, turn on the Default Group Assignment feature, and then create the group again.

2. Create groups and assign users to the groups.

3. If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, turn off the Default Group Assignment feature when you have finished creating the groups and adding members to the groups.

4. Import your records with the default Owner (user), which will propagate groups to the records.

To turn on the default group assignment feature

1. In the upper right corner of any page, click the Admin global link.
2. Click the Company Administration link.
3. Click the Company Profile link.
4. On the Company Profile page, click Edit.
5. In the Company Data Visibility Settings section, select the Default Group Assignment check box.
6. Save the settings.

To set up a group

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, in the User and Group Management section, click the Public Sharing Groups link.
4. On the Group List page, click New Group.
5. On the Group Edit page, complete the required fields.

Field	Description
Name	Limit of 50 characters. Required field by default.
Description	Limit of 255 characters.

NOTE: You can rename the group without affecting existing records, since the application uses the underlying group ID to track group records, not the group name. However, your group name needs to be unique within your company.

6. Click Save.
7. On the Group Detail page, click Add Members.
8. On the Group Members page, click the Lookup icons and add users.

   Only users who have not been assigned to a group appear on the list. To determine which group a user belongs to, you need to go to that user's Detail page.
9. Save the record.
10. If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, turn off the Default Group Assignment feature when you have finished creating the groups and adding members to the groups.

To turn off the Default Group Assignment feature, do the following:

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

b Click the Company Administration link.

c Click the Company Profile link.

d On the Company Profile page, click Edit.

e In the Company Data Visibility Settings section, clear the Default Group Assignment check box.

f Save the settings.

If you later decide to make changes to the groups or group membership, you must turn on the Default Group Assignment feature again before you make the changes, and then turn it off when you have finished making your changes.

About Changing the Default Group Assignment Setting

If your company decides to no longer use groups, you should perform the following steps before turning off the Default Group Assignment feature:

1 Delete all users except for the one that you want to be the Primary Owner of the group's records.

2 Delete the group.

3 Clear the Default Group Assignment checkbox on the company profile.

Related Topics

See the following topics for related information about groups and sharing calendars:

- Group Management (on page 383)
- Viewing the Calendars of Other Users
- Adding Custom Calendar Views

Territory Management

You can set up territories and territory hierarchies. For example, a company might organise its sales force into groups or territories. The territories might be based on geography, products, or industries. Each sales group is responsible for handling the accounts and sales opportunities in its territory. You can use the territories that you set up in Oracle CRM On Demand as the basis for assigning new account and opportunity records. For information on setting up territories, see Setting Up Territories (on page 389).

Setting Up Territories

Before you begin:

- If your territories have not already been defined at your company, determine the naming convention and hierarchy before setting up the information in Oracle CRM On Demand. When entering the information, start from the top level, and then add the subterritories.
- To perform the following procedures, your role must include the Manage Territories privilege.

The following procedure describes how to set up a territory.

To set up a territory

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the Territory Management link.
3. On the Territory Hierarchy page, perform one of the following tasks:
   - To add a territory, click New Territory.
   - To update territory information, click the appropriate link in the Territory Name column, and then, on the Territory Detail page, click Edit.
4. On the Territory Edit page, enter the required information.

Field	Description
Territory Name	Limit of 50 characters.
Parent Territory	If this is a top-level territory, leave this blank.
Current Quota	You can enter a quota assigned to this territory.
Territory Currency	Inherits your company's default currency.

5. Save the record.
6. (Optional) On the Territory Detail page, click New in the Child Territories title bar to add subterritories.

To update the parent territory

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the Territory Management link.
3. On the Territory Hierarchy page, select the child territory.
4. On the Territory Detail page, click Edit.
5. On the Territory Edit page, click the Lookup icon next to the Parent Territory field.

6 In the Lookup window, select the parent account.

7 Save the record.

To update records with territory

There are several ways to update the territory field on a record. Typically, this is an automated process:

- **Assignment Manager:** You can use Assignment Manager to populate this field and the related owner and team members for the record.
- **Import:** When you want to update territory ownership on many records, set the reassign owner flag to trigger the assignment of records using Assignment Manager.
- **Manual:** A user can assign their territory to a record.

How Access Rights Are Determined

For information about how Oracle CRM On Demand determines access rights to the data represented by the various record types, see the following topics:

- How Access Rights for Displaying Primary Record-Type Records Are Determined (on page 390)
- How Access Rights for Working with Primary Record-Type Records Are Determined (on page 391)
- How Access Rights for Displaying Related Record-Type Records Are Determined (on page 393)
- How Access Rights for Working with Related Record-Type Records Are Determined (on page 395)
- Examples of Access Level Calculations (on page 396)

How Access Rights for Displaying Primary Record-Type Records are Determined

When a user tries to view a list of records of a primary record type by clicking a tab, or performing a search, or using a Web service, Oracle CRM On Demand uses the following process to determine the access rights of the user to records of that record type:

- Oracle CRM On Demand determines the permissions given to the user by the privileges on the user role.
- Oracle CRM On Demand determines the permissions given to the user by the record-type settings on the user role (Has Access, Can Create, and Can Read All Records).

If the user's privileges allow the user to work with records of a given record type, and the Can Read All Records setting is selected for the record type on the user role, the user can see all records of that record type.

If the user's privileges allow the user to work with records of a given record type, but the Can Read All Records setting is deselected for the record type on the user role, the user can see any records of that record type that the user owns, as well as any records of that record type that the user is authorised to see through any of the following access-control components:

- The reporting hierarchy
- Membership of custom books
- User delegation
- Team membership

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Examples of Access Level Calculations (on page 396)
- Process of Setting Up Access Profiles (on page 332)

How Access Rights for Working with Primary Record-Type Records are Determined

When a user tries to update, delete, or drill down to see more details on a primary record, Oracle CRM On Demand uses the following process to determine what actions the user can perform on the record:

- Oracle CRM On Demand determines the access levels granted by the access profile on the user's role:
  - If the user is the owner of the record, the user's owner access profile is used.
  - If the user is not the owner of the record, but the Can Read All Records option is selected for the record type on the user's role, the user's default access profile is used.
- Oracle CRM On Demand determines the access levels granted by each of the following access-control components:
  - The reporting hierarchy
  - Membership of custom books
  - User delegation
  - Team membership

More information about how Oracle CRM On Demand determines the access levels granted by the reporting hierarchy, membership of custom books, user delegation, and team membership is provided in the rest of this topic. Oracle CRM On Demand always uses the most permissive level of access from each of these access-control components, so keep this in mind when you create access profiles and assign them to users, books, and teams.

The combination of the access permissions for the record determines what actions the user can perform on the record. If the user has at least read-only access to the record, the record details are displayed. Otherwise, the user sees an error message.

Access Rights from the Reporting Hierarchy

To determine the access rights that can be granted through a user's position in the reporting hierarchy, Oracle CRM On Demand considers the following for each subordinate of the user:

- If the subordinate is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the current user.
- If the subordinate is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the subordinate as a team member.

NOTE: If the subordinate is not the record owner or a member of the team for the record, the subordinate does not contribute to the access calculation.

Oracle CRM On Demand then considers all of the access rights that subordinates contribute to the access calculation and calculates the most permissive access level that can be given to the user.

Access Rights from Membership of Custom Books

To determine the access rights that can be granted through a user's membership of custom books, Oracle CRM On Demand considers the following:

- If the record is associated with a book, then Oracle CRM On Demand extracts the access level for the record type from the access profile assigned to the user who is a member of the book.
- If the record is associated with a child book in a book hierarchy with multiple levels, such as grandparent, parent, and child, then the access level is extracted as follows:
  - If the user is a member of all three books, then the access level is derived from the access profiles of the user from each of the grandparent, parent and child books.
  - If the user is a member of the grandparent book only, then the access level is derived from the access profile of the user from the grandparent book.

In all cases, if one or more of the access levels for the record is Inherit Primary, then the inherited access level of the primary record type is used. If more than one access level for the record is Inherit Primary, then a union of the inherited access levels of the primary record types from each access profile is used. Oracle CRM On Demand then considers all levels of access that book membership contributes to the final access calculation and determines the most permissive access level that can be given to the user.

Access Rights from User Delegation

To determine the access rights that can be granted through user delegation, Oracle CRM On Demand considers the following for each delegator (that is, each user for whom the current user is a delegate):

- If the delegator is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the delegator.
- If the delegator is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the delegator in the team.
- If the subordinate of the delegator is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the subordinate.
- If a subordinate of a delegator is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the subordinate in the team.

Oracle CRM On Demand then considers all levels of access that user delegation contributes to the access calculation and determines the most permissive access level that can be given to the user.

Access Rights from Team Membership

If the user is a team member on a record (but is not the owner of the record), Oracle CRM On Demand extracts the access level for the primary record type from the access profile on the user's team membership.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Examples of Access Level Calculations (on page 396)
- Process of Setting Up Access Profiles (on page 332)

How Access Rights for Displaying Related Record-Type Records are Determined

When a user successfully views the Detail page for a record, Oracle CRM On Demand uses the following process to determine which related records the user can see:

- Oracle CRM On Demand verifies that the user's role has the necessary privileges to view the record type. If the user's role does not have the necessary privileges to view the record type, the records of this related record type are not shown.
- If the related record type is based on a primary record type, Oracle CRM On Demand verifies that the Has Access check box for the related record type is selected. If the Has Access check box is deselected for the related record type, the records of this related record type are not shown.
- If the owner of the parent record is the current user, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is the current user's subordinate at any level in the reporting hierarchy, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is an unrelated user:
  - If the Can Read All Records option is selected for the related record type on the current user's role, Oracle CRM On Demand extracts the access level for the related record type from the current user's default access profile.
  - If the Can Read All Records option is deselected for the related record type on the current user's role, the current user's default access profile is not used.

    In this case, the current user gains access to the Detail page of the parent record in one or more of the following ways:
    - The current user is a member of the team on the parent record.
    - The current user has a direct or indirect subordinate who has access to the parent record.
    - The current user is a member of a book that contains the parent record, or the parent record is in a subbook of a book where the current user is a member.
    - The current user has been delegated by another user who has access to the parent record.

Oracle CRM On Demand therefore extracts the access levels for the related record type from the access profiles for the parent record through each of the applicable access-control components.

- Oracle CRM On Demand then evaluates all the related access levels to determine if the Inherit Primary access level is present in the set of access levels and determines what records to display, as follows:
  - If the Inherit Primary access level is not found:
    - If the most permissive access level is No Access, then the related records are not shown.
    - If the most permissive access level is anything other than No Access, then all related records are shown, including records the current user is not authorised to see.
  - If the Inherit Primary access level is found, and the Can Read All Records check box is selected for the related record type in the current user's role, then all related records are displayed.
  - If the Inherit Primary access level is found, and the Can Read All Records check box is deselected for the related record type in the current user's role, then the set of related records that is shown includes all records where any one of the following is true:
    - The current user owns the related record.
    - The current user is a member of the team on the related record.
    - The current user has a direct or indirect subordinate who has access to the record.
    - The current user is a member of a book that contains the related record, or the related record is in a subbook of a book where the current user is a member.
    - The current user has been delegated by another user who has access to the related record.

  NOTE: The Activities, Open Activities, and Closed Activities related record types are exceptions to the rules stated above. If the Inherit Primary access level is found for an activities related record type, and the Can Read All Records check box is deselected for the Activity record type in the current user's role, then the set of related activities that is shown includes only the activities that the user owns, activities that the user delegated to another user, and activities that are owned by a group that includes the user. Activities that the current user can access only through books, activities that the current user can access only because the user is a delegate for another user, and activities that the current user can access only through the reporting hierarchy are not included in the set of related activities.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Examples of Access Level Calculations (on page 396)
- Process of Setting Up Access Profiles (on page 332)

How Access Rights for Working with Related Record-Type Records are Determined

When a user attempts to update, delete, or drill down to see more details on a related record, Oracle CRM On Demand uses the following process to determine what actions the user can perform on the record:

- If the owner of the parent record is the current user, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is the current user's subordinate at any level in the reporting hierarchy, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is an unrelated user:
  - If the Can Read All Records option is selected for the related record type on the current user's role, Oracle CRM On Demand extracts the access level for the related record type from the current user's default access profile.
  - If the Can Read All Records option is deselected for the related record type on the current user's role, the current user's default access profile is not used.

    In this case, the current user gains access to the Detail page of the parent record in one or more of the following ways:
    - The current user is a member of the team on the parent record.
    - The current user has a direct or indirect subordinate who has access to the parent record.
    - The current user is a member of a book that contains the parent record, or the parent record is in a subbook of a book where the current user is a member.
    - The current user has been delegated by another user who has access to the parent record.

    When access to the related record is granted through the context of the parent record, Oracle CRM On Demand extracts the appropriate access level for the related record type from the access profiles for each of the applicable access-control components.
- For the related record, Oracle CRM On Demand also extracts the access levels from the current user's relationship to the related record where any one of the following is true:
  - The current user is a member of the team on the related record. If the current user is the owner of the related record, the user is also on the team, therefore the owner access profile is used.
  - The current user has a direct or indirect subordinate who has access to the related record.
  - The current user is a member of a book that contains the related record or the related record is in a subbook of a book where the current user is a member.
  - The current user has been delegated by another user who has access to the related record.
- Oracle CRM On Demand then evaluates all the applicable access levels to determine if the Inherit Primary access level is present in the set of access levels:
  - If the Inherit Primary access level (or any of its combinations) is found in the set of applicable access levels, the related record type inherits the role settings of its own primary record type as well as the access settings. The Inherit Primary access level setting determines the actions the user can perform on the records. If Oracle CRM On Demand finds two or more Inherit Primary access levels, the

combination of the access levels is determined. For more information about the Inherit Primary access level and its combinations, see About Access Levels for Related Record Types (on page 325).

- If the Inherit Primary access level (or any of its combinations) is not found in the set of applicable access levels, then, if the related record type has a corresponding primary record type, Oracle CRM On Demand determines the intersection of the access levels for the primary record type and the related record type.

  For example, if the access level for the Opportunities related record type is Read-Only, and the access level for its corresponding Opportunity primary record type is Read/Edit, then the intersection of the access levels is Read-Only.

The combination of all the resulting access levels for the related record type determines what actions the user can perform on records of that record type.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Examples of Access Level Calculations (on page 396)
- Process of Setting Up Access Profiles (on page 332)

Examples of Access Level Calculations

Click the following links to see some examples of how Oracle CRM On Demand calculates the access rights of users:

- Example 1: Using the View Access Level (on page 397)
- Example 2: Using the Inherit Primary Access Level (on page 401)
- Example 3: Securing Data Through Books (on page 404)

The access rights in the examples are based on certain configurations of user roles, access profiles, and other access-control components. Oracle CRM On Demand calculates the access rights for an authenticated user each time the user interacts with it. Oracle CRM On Demand determines the access rights from the user's role and all of the access profiles that are applicable through owner access profiles, default access profiles, the reporting hierarchy, membership of custom books, user delegation, and team membership, which are referred to as the *access-control components.*

NOTE: Users can be employees of your company or employees of a partner organisation. Users can also be external systems that access Oracle CRM On Demand.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 317)
- Process of Setting Up Access Profiles (on page 332)

Example 1: Using the View Access Level

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, Amanda Jacobsen has the Sales Rep role. Amanda can create new accounts and see all other account records. She is allowed to create opportunities, but she can see only opportunities that she owns or that she is authorised to see.

The following table shows the record-type settings on the Sales Rep role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	Yes
Opportunity	Yes	Yes	No

The Sales Rep role gives Amanda full control over the accounts and opportunities that she creates and restricted rights on records that she does not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	View
Opportunity	Read/Edit/Delete	Not applicable	Not applicable

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	View
Opportunity	Read-Only	Not applicable	Not applicable

In this example of calculating access rights, it is assumed that team inheritance is not enabled for the Opportunity record type, that is, the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page is deselected. For more information about the behaviour of the parent team inheritance functionality, see About Access Propagation Through Team Inheritance (on page 321).

David Bloom also has a Sales Rep role in the same company. David has the same access rights as Amanda.

Amanda is the owner of Opportunity X, which is linked to Account 1. David creates an opportunity, Opportunity Y, and also links it to Account 1. Amanda is not on the opportunity team.

When Amanda views the list of the accounts in her company, she can see all accounts because her role allows her visibility to all accounts, including those she does not own. The following table shows the records that Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1	
Account Detail	
Account Name:	Account 1

Account Detail: Account 1		
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name		**Owner**
Opportunity X		Amanda Jacobsen
Opportunity Y		David Bloom
Account Team		
Last Name	**First Name**	**Account Access**
Hope	Jonathan	Owner

Related Record Visibility in Example 1

To determine which related opportunity records Amanda can see on the account in this example, Oracle CRM On Demand examines Amanda's access rights, as follows:

1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

  In this example, the answer is no.

- Determines if Amanda's role allows her to read all account records.

  In this example, the answer is yes. Amanda's role allows her to read all account records, therefore Amanda can see the account. Because Amanda is not the owner of the parent account, her default access profile is used. The access level for the opportunity related record type on Amanda's default access profile is View.

- Determines if the parent record is in a book where Amanda is a book member.

  In this example, the answer is no.

- Determines if Amanda is a member of the account team.

  In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the account team.

  In this example, the answer is no.

  If the answer to this question is yes (that is, one or more of Amanda's subordinates is a member of the account team), Oracle CRM On Demand extracts the access level for the opportunity related record type for each of those subordinates from the appropriate access profile. The access profile assigned in the Account Access field on the subordinate's team

membership on the account is used in that case (not the access profile assigned in the Opportunity Access field).

- Determines if Amanda has access to the account record through delegation.

  In this example, the answer is no.

2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

  In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on the user's role.

- Determines if Amanda's role grants her the privilege for the opportunity record type.

  Opportunities are not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

  In this example, the answer is no.

3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the most permissive access level found is View. The Inherit Primary access level is not present, therefore all child opportunity records, including those the user is not authorised to see, are shown.

Actions on Related Records in Example 1

When a user attempts to perform an action on a related record, Oracle CRM On Demand must determine whether the user has the appropriate access rights for that action. In this example, Amanda can attempt to read the record details, or to edit the record, or to delete the record. Two cases are considered:

- In Case 1, Amanda attempts to perform an action on Opportunity X.
- In Case 2, Amanda attempts to perform an action on Opportunity Y.

Case 1: Amanda attempts to perform an action on Opportunity X, which she owns.

Oracle CRM On Demand examines Amanda's access rights, as follows:

1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

  In this example, the answer is no.

- Determines if Amanda's role allows her to read all opportunity records.

  In this example, the answer is no. Although Amanda can see the parent account record because her default access profile is used, her default access profile is not used for the opportunity record.

- Determines if the opportunity record is in a book where Amanda is a book member.

  In this example, the answer is no.

- Determines if Amanda is a member of the opportunity team.

  In this example, the answer is yes. Amanda is the owner of the opportunity, and is therefore in the opportunity team. The access level of the primary opportunity record type from Amanda's default access profile (the Sales Rep Default Access Profile) is Read/Edit/Delete.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the opportunity team.

  In this example, the answer is no.

- Determines if Amanda has access to the account record through delegation.

  In this example, the answer is no.

2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

  In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

- Determines if Amanda's role grants her the privilege for the Opportunity record type.

  The Opportunity record type is not controlled through privileges. Therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

  In this example, the answer is no.

3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the most permissive access level found is Read/Edit/Delete.

Case 2: Amanda attempts to perform an action on Opportunity Y, which is owned by David Bloom.

Oracle CRM On Demand examines Amanda's access rights, as follows:

1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

  In this example, the answer is no.

- Determines if Amanda's role allows her to read all opportunity records.

  In this example, the answer is no. Although Amanda can see the parent account record because her default access profile is used, her default access profile is not used for the opportunity record.

- Determines if the opportunity record is in a book where Amanda is a book member.

  In this example, the answer is no.

- Determines if Amanda is a member of the opportunity team.

  In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the opportunity team.

  In this example, the answer is no.

- Determines if Amanda has access to the account record through delegation.

  In this example, the answer is no.

2. Oracle CRM On Demand then does the following:

   - Determines if Amanda's role allows her basic access to opportunity records.

     In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

   - Determines if Amanda's role grants her the privilege for the Opportunity record type.

     The Opportunity record type is not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

   - Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

     In this example, the answer is no.

3. Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the final access level is No Access.

Related Topics

See the following topics for additional examples:

- Example 2: Using the Inherit Primary Access Level (on page 401)
- Example 3: Securing Data Through Books (on page 404)

Example 2: Using the Inherit Primary Access Level

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, Amanda Jacobsen is a Sales Rep in her company. Amanda can create new accounts and see all other account records. She is allowed to create opportunities, but she can see only opportunities that she owns or that she is authorised to see.

The following table shows the record-type settings on the Sales Rep Role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	Yes
Opportunity	Yes	Yes	No

The Sales Rep role gives Amanda full control over the accounts and opportunities she creates, and restricted rights on records that she does not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	Inherit Primary
Opportunity	Read/Edit/Delete	Not applicable	Not applicable

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	Inherit Primary
Opportunity	Read-Only	Not applicable	Not applicable

In this example of calculating access rights, it is assumed that team inheritance is not enabled for the Opportunity record type, that is, the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page is deselected. For more information about the behaviour of the parent team inheritance functionality, see About Access Propagation Through Team Inheritance (on page 321).

David Bloom is also a Sales Rep in the same company. David has the same access rights as Amanda.

Amanda is the owner of Opportunity X, which is linked to Account 1. David creates an opportunity, Opportunity Y, and also links it to Account 1. Amanda is not on the opportunity team.

When Amanda views the list of the accounts in her company, she can see all accounts because her role allows her visibility to all accounts, including those she does not own. The following table shows the records that Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1			
Account Detail			
Account Name:	Account 1		
Owner:	Jonathan Hope		
Opportunities			
Opportunity Name			**Owner**
Opportunity X			Amanda Jacobsen
Account Team			
Last Name	**First Name**		**Account Access**
Hope	Jonathan		Owner

Account Detail: Account 1		
Bloom	David	Member

Related Record Visibility in Example 2

To determine which related opportunity records Amanda can see on the account in this example, Oracle CRM On Demand examines Amanda's access rights, as follows:

1. Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:
   - Determines if Amanda owns the parent account.

     In this example, the answer is no.
   - Determines if Amanda's role allows her to read all account records.

     In this example, the answer is yes. Amanda's role allows her to read all account records, therefore Amanda can see the account. Because Amanda is not the owner of the parent account, her default access profile is used. The access level for the opportunity related record type on Amanda's default access profile is Inherit Primary.
   - Determines if the parent record is in a book where Amanda is a book member.

     In this example, the answer is no.
   - Determines if Amanda is a member of the account team.

     In this example, the answer is no.
   - Determines if any of Amanda's subordinates (direct or indirect) is a member of the account team.

     In this example, the answer is no.

     If the answer to the question is yes (that is, one or more of Amanda's subordinates is a member of the account team), Oracle CRM On Demand extracts the access level for the opportunity related record type for each of those subordinates from the appropriate access profile. The access profile assigned in the Account Access field on the subordinate's team membership on the account is used in that case (not the access profile assigned in the Opportunity Access field).
   - Determines if Amanda has access to the account record through delegation.

     In this example, the answer is no.
2. Oracle CRM On Demand then does the following:
   - Determines if Amanda's role allows her basic access to opportunity records.

     In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.
   - Determines if Amanda's role grants her the privilege for the opportunity record type.

     Opportunities are not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

  In this example, the answer is yes, therefore Oracle CRM On Demand displays the following opportunity records on the account:

  - All linked opportunity records where Amanda is the owner.
  - All linked opportunity records that Amanda is authorised to see through all other access-control components.

  Amanda's role denies her the ability to see opportunities that she does not own, and so she cannot see the opportunity that David Bloom created.

Actions on Related Records in Example 2

When Amanda attempts to perform an action on Opportunity X in this example, the calculation is the same, and the outcome of the access rights is the same as that in Case 1 in Example 1: Using the View Access Level (on page 397). The final access level is Read/Edit/Delete.

Related Topics

See the following topics for additional examples:

- Example 1: Using the View Access Level (on page 397)
- Example 3: Securing Data Through Books (on page 404)

Example 3: Securing Data Through Books

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, a company uses custom books to organise its data by territory. Two books are used in this example: South West and East.

The South West book has three members:

- Amanda Jacobsen
- David Bloom
- Carlos Guzman

All users in the South West book have the Read-Only access profile on their book role.

The East book has three members:

- Rick Rogers
- Raj Kumar
- Jonathan Hope

All users in the East book have the Read-Only access profile on their book membership record.

When any of the users creates an account or opportunity record, an automated (workflow) process assigns the appropriate book to the record. It assigns the book based on the territory attribute of the record.

All of the users have the Sales Rep role. They can create new accounts and opportunities. They can see all account and opportunity records in their territory, but not in other territories.

The following table shows the record-type settings on the Sales Rep role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	No
Opportunity	Yes	Yes	No

All of the users have full control over the accounts and opportunities that they create, but they have restricted rights on records that they do not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	Inherit Primary
		Books	Read-Only
Opportunity	Read/Edit/Delete	Books	Read-Only

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	Inherit Primary
		Books	Read-Only
Opportunity	Read-Only	Books	Read-Only

NOTE: For all primary record types that support books, the relationship with the Books related record type is a one-to-child relationship.

In this example of calculating access rights, it is assumed that team inheritance is not enabled for the Opportunity record type, that is, the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page is deselected. For more information about the behaviour of the parent team inheritance functionality, see About Access Propagation Through Team Inheritance (on page 321).

When Amanda Jacobsen views the list of the accounts in her company, she can see the accounts in the South West book and the accounts she owns. She cannot see any other accounts.

The following table shows the records Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1	
Account Detail	
Account Name:	Account 1

Account Detail: Account 1		
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name		**Owner**
Opportunity X		Amanda Jacobsen
Opportunity Y		David Bloom
Account Team		
Last Name	**First Name**	**Account Access**
Hope	Jonathan	Owner

Amanda can see two opportunities because those opportunities are in the South West book, where she is a member. All other members of the South West book can see those opportunities.

Jonathan Hope is a member of the East book. When Jonathan signs in to Oracle CRM On Demand, he can also see Account 1, because he owns the account. However, he cannot see any opportunities that are related to Account 1, but which he does not own. The Inherit Primary access level on the Opportunities related record type on accounts provides this security.

Rick Rogers and Raj Kumar, who are members of the East book, cannot see the Account 1, Opportunity X, or Opportunity Y records. They cannot see the account because it is not in the East book, and their role prevents them from seeing account records that they do not own. Similarly, they cannot see Opportunity X or Opportunity Y because these opportunities are not in the East book, and their role prevents them from seeing opportunities they do not own.

Amanda cannot modify the Opportunity Y, which is owned by David Bloom. This is because of the following:

- Amanda does not own the account, therefore her owner access profile is not used.
- Amanda's role prevents her from accessing opportunity records that she does not own, therefore her default access profile is not used.
- The only access profile that is active at this point is the Read-Only access profile that Amanda has through her membership of the South West book.

Therefore, Amanda's access level to Opportunity Y is Read-Only.

Related Topics

See the following topics for additional examples:

- Example 1: Using the View Access Level (on page 397)
- Example 2: Using the Inherit Primary Access Level (on page 401)

Business Process Management

Click a topic to see step-by-step instructions for performing the following:

- Creating Processes (on page 414)
- Adding Transition States to Processes (on page 415)
- Restricting Processes (on page 418)
- Configuring the Field Set-up for Transition States (on page 419)
- Enabling Access Controls for Related Record Types (on page 419)
- Creating Workflow Rules (on page 446)
- Restricting Workflow Rules to Specific Channels or Roles (on page 458)
- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)
- Changing the Order of Workflow Rule Actions (on page 489)
- Changing the Order of Workflow Rules (on page 490)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)
- Viewing Error Instances in the Workflow Error Monitor (on page 494)
- Deleting Error Instances from the Workflow Error Monitor (on page 496)
- Viewing Pending Instances in the Workflow Wait Monitor (on page 500)
- Deleting Pending Instances from the Workflow Wait Monitor (on page 502)
- Setting Up Assignment Rules (on page 509)
- Mapping Additional Fields During Lead Conversion (on page 516)
- Creating Lead Conversion Layouts (on page 518)
- Setting Up the Forecast Definition (on page 521)
- Updating the Forecast Definition (on page 527)
- Setting Up Sales Processes, Categories and Coaches (on page 528)
- Customising Your Company's Industry List (on page 536)
- Modification Tracking (on page 537)
- Enabling the Modification Tracking Feature (on page 538)

Related Topics

See the following topics for related information:

- About Transition States and Transition Fields in Process Administration (on page 409)
- About Primary Fields in Process Administration (on page 409)
- Scenario for Locking Activity Records (on page 410)
- Example of Using Processes to Lock Records (on page 410)
- Process Administration Functionality (on page 412)
- Process of Setting Up Processes in Oracle CRM On Demand (on page 414)
- Workflow Configuration (on page 422)
- Workflow Monitors (on page 494)
- About Assignment Rules (on page 505)
- Lead Conversion Administration (on page 515)

Process Administration

In the process administration section of Oracle CRM On Demand, you can set up processes to prevent users, including external applications, from performing certain actions on records of a given record type when the records are in a particular state. Preventing users from performing certain actions in this way is referred to as *locking records*.

The process administration functionality is not enabled in Oracle CRM On Demand by default. It must be enabled for each company by Oracle CRM On Demand Customer Care. If your company wants to use the process administration functionality, contact Oracle CRM On Demand Customer Care, and ask to have the Process Administration privilege granted to your company administrator's role.

When Oracle CRM On Demand Customer Care grants the Process Administration privilege to the company administrator, the company administrator can then grant the privilege to other roles.

NOTE: The controls that determine which records are locked are the last security component that Oracle CRM On Demand examines when calculating a user's rights to work with a record. The permissions granted by all of the other access-control components are examined first. An *access-control component* is functionality in Oracle CRM On Demand that contributes to the calculation of a user's rights to access and work with records. Examples of access-control components are: record ownership, access profiles, roles, teams, books, and the reporting hierarchy. The controls that lock records do not override any restrictions imposed by the other access-control components.

If necessary, you can allow certain users to override the record-locking processes that your company puts in place. For more information, see About Overriding Record-Locking Processes (on page 421).

For information about processes and how to create them, see the following topics:

- About Transition States and Transition Fields in Process Administration (on page 409)
- About Primary Fields in Process Administration (on page 409)
- Scenario for Locking Activity Records (on page 410)

- Example of Using Processes to Lock Records (on page 410)
- Process Administration Functionality (on page 412)
- Process of Setting Up Processes in Oracle CRM On Demand (on page 414)
- Creating Processes (on page 414)
- Adding Transition States to Processes (on page 415)
- Restricting Processes (on page 418)
- Configuring the Field Set-up for Transition States (on page 419)
- Enabling Access Controls for Related Record Types (on page 419)

About Transition States and Transition Fields in Process Administration

In a process for a record type, you set up a number of transition states. A *transition state* represents a state that a record enters when certain conditions are met. A *transition field* is a picklist field on the record type that determines the transition of a record from one transition state to another. The picklist field for a process is identified in the definition of the process.

In a process, each value in the transition field can be linked to one transition state. For each transition state, you can specify the following information:

- **Condition.** The condition determines whether a record can move to this transition state.
- **Error message.** The error message appears if the condition is not met when a user tries to move a record to this transition state.
- **Record access controls.** The record access controls determine what actions users are prevented from performing on a record when the record is in the transition state. You can prevent users from deleting or updating records in the transition state.
- **Field set-up.** The field set-up determines the behaviour of certain fields when a record is in the transition state.
- **Related access controls.** The related access controls determine what actions users are prevented from performing on related records when the parent record is in the transition state.

For example, you can set up a process for the Solution record type, using the Status field as the transition field, and add three transition states to the process, one for each of the following status values: Draft, Approved, and Obsolete. You can then prevent users from deleting solutions that are in the transition state for the Approved status, or prevent users from updating solutions that are in the transition state for the Obsolete status, and so on.

About Primary Fields in Process Administration

You can use a picklist field on a record type to restrict a process so that the process applies only to certain records of that record type. The picklist field is referred to as the *primary field*, and a process applies only to records where the value in the primary field on the record matches one of the values that you specify for the process, that is, the primary values. For example, the Call Type field can be used as the primary field on the

Activity record type. You can restrict a process for the Activity record type so that the process applies only to certain types of call records.

Scenario for Locking Activity Records

This topic gives one example of how sales representatives in a pharmaceutical company use call activity records in Oracle CRM On Demand to record details of their visits to customers and of how the call activity records are locked at certain points. Your company might use Oracle CRM On Demand differently, depending on your business model.

A sales representative plans a visit to a local clinic to restock the sample cabinet at the clinic, and to talk to the head of the clinic about a new product that the pharmaceutical company is about to launch. The sales representative plans to give the head of the clinic a promotional CD that contains clinical trial results and a White Paper. When the sales representative sets up the call activity record in Oracle CRM On Demand, he sets the status of the record to Not Started.

When the sales representative arrives at the clinic, there is a delay while a staff member at the clinic gets the key to the samples cabinet. The sales representative uses the time to update the status of the call activity record in Oracle CRM On Demand to In Progress. The sales representative successfully stocks the samples cabinet, shares the message about the new product with the head of the clinic, and gives her the promotional material.

Towards the end of the day, the sales representative signs in to Oracle CRM On Demand and starts to update the records related to the activities of the day. The sales representative updates the call activity record for the call to the clinic, but he wants to review the record one more time before changing the status of the record to the final status of Submitted. However, the sales representative is scheduled to attend a sales meeting, so he sets the status of the record to Completed and leaves to attend the meeting. At this point, the record cannot be deleted from Oracle CRM On Demand.

When the sales representative returns from the meeting, he reviews the call activity record again and then sets the status of the record to Submitted. At this point, the call activity record cannot be updated, it cannot be deleted from Oracle CRM On Demand, and all of the fields on the record are read-only. In addition, other records cannot be linked to the submitted call activity record. An example of a process that supports this scenario is given in Example of Using Processes to Lock Records (on page 410).

Example of Using Processes to Lock Records

This topic gives an example of creating a process to support the scenario described in Scenario for Locking Activity Records (on page 410). You might use this feature differently, depending on your business model.

You create a process that limits the actions that users can perform, as follows:

- When the status of the record is Completed, users cannot delete the record.
- When the status of the record is Submitted, the following happens:
  - Users cannot update or delete the record, or link other records to the call activity record.
  - All fields on the call activity record are read-only.
- The process applies to account calls and professional calls but not to general calls.

To set up a process to lock call activity records

1 In Oracle CRM On Demand, create a process as follows:

   a In the Process Name field, enter a unique name for the process.

   b In the Object Name field, select Activity.

   When you select Activity in the Object Name field, the value in the Primary Field is automatically set to Call Type. The Transition Field is automatically set to Status. For more information about creating processes, see Creating Processes (on page 414).

2 Add the transition states shown in the following table to the process that you created in Step 1 of this procedure.

   For more information about adding transition states to processes, see Adding Transition States to Processes (on page 415).

State	Disable Update Check Box	Disable Delete/Remove Check Box
Not Started	Deselected	Deselected
In Progress	Deselected	Deselected
Completed	Deselected	Selected
Committed	Selected	Selected

3 Restrict the process so that it applies to account calls and professional calls but not to general calls, by adding the Account Calls and Professional Calls primary values to the process.

   For more information about restricting processes, see Restricting Processes (on page 418).

4 On the Submitted transition state, configure the field set-up, and select the Read-Only check box for all fields.

   For more information about configuring the field set-up for transition states, see Configuring the Field Set-up for Transition States (on page 419).

5 On the Completed and Submitted transition states, enable the appropriate access controls for the related record types.

   The settings for the check boxes are shown in the following table. For more information about enabling access controls for related record types, see Enabling Access Controls for Related Record Types (on page 419).

Transition State	Related Record Type	Disable Create/Add	Disable Update	Disable Delete/Remove
Completed	Message Responses	Deselected	Deselected	Selected

Transition State	Related Record Type	Disable Create / Add	Disable Update	Disable Delete / Remove
	Products Detailed	Deselected	Deselected	Selected
	Promotional Item Dropped	Deselected	Deselected	Selected
	Samples Dropped	Deselected	Deselected	Selected
	Sample Requests	Deselected	Deselected	Selected
	Sample Transactions	Deselected	Deselected	Selected
	Signatures	Deselected	Deselected	Selected
	Solutions	Deselected	Deselected	Selected
Submitted	Attachments	Selected	Selected	Selected
	Books	Selected	Selected	Selected
	Contacts (M:M)	Selected	Selected	Selected
	Custom Objects 01 through 03	Selected	Selected	Selected
	Message Responses	Selected	Selected	Selected
	Products Detailed	Selected	Selected	Selected
	Samples Dropped	Selected	Selected	Selected
	Sample Requests	Selected	Selected	Selected
	Sample Transactions	Selected	Selected	Selected
	Signatures	Selected	Selected	Selected
	Solutions (M:M)	Selected	Selected	Selected

NOTE: Sample request records have sample request item records linked to them that must also be locked when the parent record is locked. To lock the sample request item records, you must set up a separate process that is based on the Sample Request record type. Similarly, sample transaction records have transaction item records linked to them. To lock the transaction item records, you must set up a separate process that is based on the Sample Transaction record type. The process that you set up for a record type locks the parent records of that record type and their child records, but the process does not lock any records that are linked to the child records.

Process Administration Functionality

The following record types are supported for process administration:

- Account

- Activity
- Address
- Business Plan
- Call Product Detail
- Event
- Lead
- Messaging Plan
- Objective
- Opportunity
- Sample Disclaimer
- Sample Request
- Sample Transaction
- Service Request
- Solution

Restrictions

The following restrictions apply:

- Only one process can be set up for each of the record types that support process administration.
- For each of the supported record types, the Status field on the record type is used as the transition field for the process. You cannot select an alternative transition field.

  NOTE: Users cannot change the status of a call product detail record directly. Oracle CRM On Demand updates the status of a call product detail record when the status of the related call is updated, so that the status of a call product detail record is always the same as the status of the related call.
- Only the Activity record type supports the use of a primary field to restrict the process. The primary field on the Activity record type is the Call Type field. You cannot select an alternative primary field.
- The options for the field set-up for transition states are limited to specifying that certain fields are read-only when a record is in the transition state.
- The Order Number field and the Default check box, which appear on the process record when you save the process, are not used in the current release of Oracle CRM On Demand.

Related Record Types

For each parent record type that is supported for process administration, you can enable access controls for all of the related record types that are supported for the parent record type and that are available to your company, with the exceptions shown in the following table.

Parent Record Type	Related Record Types Not Supported

Parent Record Type	Related Record Types Not Supported
Account	■ Assessments ■ Financial Account: Branch ■ Financial Account: Held-Away Institutions
Activity	Assessments
Business Plan	Assessments
Lead	Assessments
Objective	Assessments
Opportunity	Assessments
Service Request	Assessments

NOTE: You can allow certain users to override the record-locking processes that your company puts in place. For more information, see About Overriding Record-Locking Processes (on page 421).

Process of Setting Up Processes in Oracle CRM On Demand

To set up a process in Oracle CRM On Demand, perform the following tasks:

1. Creating Processes (on page 414)
2. Adding Transition States to Processes (on page 415)

You can also optionally perform the following tasks:

- Restricting Processes (on page 418)
- Configuring the Field Set-up for Transition States (on page 419)
- Enabling Access Controls for Related Record Types (on page 419)

Creating Processes

To create a process, complete the steps in the following procedure. This task is a step in Process of Setting Up Processes in Oracle CRM On Demand (on page 414).

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To create a process

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Process Administration.

3 In the Process List page, click New.

4 In the Process Edit page, fill in the process information.

5 Save your changes.

NOTE: The Order Number field and the Default check box that appear on the Process Detail page when you save a process are not used in the current release of Oracle CRM On Demand.

The following table describes the process fields. For more information about how these fields are used in the current release of Oracle CRM On Demand, see the restrictions listed in Process Administration Functionality (on page 412).

Field	Description
Process Name	The name that you give to the process.
Record Type	The record type for the process. For a list of the record types for which you can create processes, see Process Administration Functionality (on page 412).
Primary Field	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. This field is read-only. For the Activity record type, the default value in the Primary Field is Call Type. For other record types, the field is blank. For more information about primary fields, see About Primary Fields in Process Administration (on page 409).
Transition Field	The name of the field in the record type that determines the transition of records from one transition state to another. This field is read-only. For all supported record types, the default value is Status. For more information about transition fields, see About Transition States and Transition Fields in Process Administration (on page 409).
Description	(Optional) A description of the process.

Adding Transition States to Processes

In a process, you can link each value in the transition field to one transition state. For more information about transition fields and transition states, see About Transition States and Transition Fields in Process Administration (on page 409).

To add a transition state to a process, complete the steps in the following procedure. This task is a step in Process of Setting Up Processes in Oracle CRM On Demand (on page 414).

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To add a transition state to a process

1. In the Process List page, click the Process Name link for the process to which you want to add the transition state.
2. In the Process Detail page, scroll to the Transition States section of the page, and then click Add in the title bar of the section.
3. In the Transition State Edit page, fill in the transition state information.
4. Save your changes.
5. Repeat Step 2 through Step 4 of this procedure for each transition state that you want to add to the process.

The following table describes some of the transition state fields. The headings in the Key Information section and the Validation section of the page in Oracle CRM On Demand show the name of the transition field.

Field	Description
Key Information	
State	The transition field value that identifies this transition state. Each transition field value can be used with only one transition state in the process. When a value has been used with a transition state, the value is removed from the picklist of values in the State field.
Category	(Optional) The sales category that the transition state is associated with.
Description	(Optional) A description of the transition state.
Validation	

Field	Description
Condition	(Optional) A condition that determines whether a record can move to this transition state. You can enter an expression directly in the text box, or click the *fx* icon to open the Expression Builder window, where you can define an expression. For more information about Expression Builder, see Expression Builder (on page 845). Do not use any calculated fields in the expression. Calculated fields are not supported in expressions in the Condition field on transition states. If the condition that you specify is not met when a user tries to move a record of the record type specified in the process to this transition state, then an error message appears and the user's changes are not saved.
Error Message	(Optional) The text of the error message that appears if the condition set 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.
Record Access Control	
Disable Update	(Optional) If this check box is selected, then users, including external applications, cannot update records of the record type specified in the process when the records are in this transition state.

Field	Description
Disable Delete/Remove	(Optional) If this check box is selected, then users, including external applications, cannot delete records of the record type specified in the process while the records are in this transition state. Also, if a record in this transition state is a child of a parent record, then users cannot remove the record from the relationship if doing so results in the child record being deleted from Oracle CRM On Demand. However, if removing the child record from the relationship with the parent record does not result in the child record being deleted from Oracle CRM On Demand, then the record can be removed from the relationship while the record is in this transition state, but it cannot be deleted.

Restricting Processes

To restrict a process so that it applies only to certain records of that record type, you specify which values in the primary field in the record type are valid for the process. For more information about primary fields, see About Primary Fields in Process Administration (on page 409).

To restrict a process, complete the steps in the following procedure.

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To restrict a process

1. In the Process List page, click the Process Name link for the process that you want to restrict.
2. In the Process Detail page, scroll to the Primary Values section of the page, and then click Add in the title bar of the section.
3. In the Primary Value Edit page, in the Value field, select the values to which the process is to be restricted.

   You can select up to five values in the Primary Value Edit page. If you want to select additional values, you can repeat this procedure.
4. Save your changes.
5. Repeat Step 2 through Step 4 of this procedure as many times as necessary to add more primary values.

Configuring the Field Set-up for Transition States

You can specify how certain fields behave when a record is in the transition state by configuring the field set-up for the transition state.

To configure the field set-up for a transition state, complete the steps in the following procedure.

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To configure the field set-up for a transition state

1. In the Process Detail page, click the link in the State field for the transition state for which you want to configure the field set-up.
2. In the Transition State Detail page, scroll to the Field Set-up section of the page, and then click Add in the title bar of the section.
3. In the Field Set-up Edit page, specify the behaviour of fields when a record of the record type specified in the process is in this transition state, as follows:
   a. Select the field in the Field list.
   b. Select the check box for the behaviour that you want to configure for the field.

      NOTE: For information about restrictions that apply to configuring the field set-up for transition states, see Process Administration Functionality (on page 412).

   CAUTION: If you want to set a check box field as read-only, the field must already be displayed on the page layout where it is to be used. Otherwise, when the field is added to a page layout, an error message is displayed when users try to save a record of this type.

   You can specify settings for up to five fields in the Field Set-up Edit page. If you want to specify settings for additional fields, you can repeat this procedure.
4. Save your changes.
5. Repeat Step 2 through Step 4 of this procedure as many times as necessary to set up all the fields that you want to configure for the transition state.

Enabling Access Controls for Related Record Types

You can limit the actions that users can perform on the related records when a parent record is in the transition state by enabling access controls for the related record types.

NOTE: Some record types do not have related record types.

To enable access controls for related record types, complete the steps in the following procedure.

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To enable access controls for related record types

1. In the Process Detail page, click the link in the State field for the transition state on which you want to enable access controls for related record types.

2. In the Transition State Detail page, scroll to the Related Access Control section of the page, and then click Add in the title bar of the section.

3. In the Related Access Control Edit page, for each related record type, select the check boxes for the access controls that you want to enable.

   You can enable access controls for up to five related record types in the Related Access Control Edit page. If you want to enable access controls for additional related record types, you can repeat the procedure.

   NOTE: In the Related Access Control Edit page, the check boxes for the access controls are marked as required; that is, an asterisk appears beside the name of each of the check boxes. The check boxes are marked as required because these check box fields always have a value in the database. The value is either True, that is, the check box is selected, or False, that is, the check box is deselected. If you select a check box, the True value is saved in the database. If you do not select a check box, the False value is saved in the database.

4. Save your changes.

5. Repeat Step 2 through Step 4 of this procedure as many times as necessary to enable the access controls for the related record types for the transition state.

The following table describes the access controls for the related record types. Some related record types are not available. For a list of the related record types that are not available, see Process Administration Functionality (on page 412).

NOTE: Users can be external applications as well as users of Oracle CRM On Demand.

Field	Description
Disable Create/Add	If this check box is selected, then users cannot create new records of this related record type from the parent record or add existing records of this record type to the parent record while the parent record is in this transition state.
Disable Update	The behaviour of this check box depends on the relationship between the parent record type and the related record type, as follows: ■ If the parent record type has a one-to-many relationship with the related record type, and if this check box is selected, then users cannot update records of this related record type that are child records of the parent record, while the parent record is in this transition state. The child records cannot be updated from anywhere in Oracle CRM On Demand while the parent record is in this transition state. For example, if there are related records of the Custom Object 05 record type on the parent record, then those Custom Object 05 records cannot be updated

Field	Description
	while the parent record is in this transition state even if they are accessed from the Custom Object 05 Homepage. ■ For related record types that have a many-to-many relationship with the parent record type, the Disable Update check box is not applicable, that is, it cannot be used to prevent users from updating related records of that type while the parent record is in this transition state.
Disable Delete/Remove	The behaviour of this check box depends on the relationship between the parent record type and the related record type, as follows: ■ If the parent record type has a one-to-many relationship with the related record type, and if this check box is selected, then users cannot delete records of this related record type that are child records of the parent record while the parent record is in this transition state. The child records cannot be deleted from anywhere in Oracle CRM On Demand while the parent record is in this transition state. ■ If the related record type has a many-to-many relationship with the parent record type, and if this check box is selected, then users cannot remove child records of this record type from their relationship with the parent record while the parent record is in this transition state. However, users can delete the child records from other places in Oracle CRM On Demand, such as from a list accessed from the record-type Homepage.

About Overriding Record-Locking Processes

Certain users such as administrators or managers might need to work with locked records without being restricted by the record-locking processes. You can allow a user to override the record-locking processes by enabling the Override Process Administration privilege on the user's role.

The Override Process Administration privilege removes only the restrictions that are put in place by the record-locking processes. To work with the locked records, the users must have visibility to the records and have the appropriate access levels and permissions. The Override Process Administration privilege allows users to override the record-locking processes for all record types. You cannot specify that a user is allowed to override the record-locking processes for some records or record types only.

NOTE: The Override Process Administration privilege is not available by default. If you want the privilege to be enabled for your company, then contact Oracle CRM On Demand Customer Care.

Workflow Configuration

To configure workflow rules to meet your company's business requirements, do the following:

1. Work with all the stakeholders to plan the business processes.
2. Document all of the workflow rules and the corresponding workflow actions that you must configure. For more information about the components of workflow rules, see About Workflow Rules (on page 423).
3. Sign in to Oracle CRM On Demand as the company administrator, and create the workflow rules. For more information, see Creating Workflow Rules (on page 446) and Creating Scheduled Events (on page 451).
4. Within the new workflow rules and scheduled events, define all the required workflow actions. For information about creating the various types of workflow actions, see the following topics:
   - About Workflow Actions (on page 434)
   - Creating Workflow Actions: Assign a Book (on page 459)
   - Creating Workflow Actions: Create Integration Event (on page 462)
   - Creating Workflow Actions: Create Task (on page 466)
   - Creating Workflow Actions: Send Email (on page 471)
   - Creating Workflow Actions: Update Values (on page 484)
   - Creating Workflow Actions: Wait (on page 486)
   - Deactivating Workflow Rules and Actions (on page 491)
   - Deleting Workflow Rules and Actions (on page 492)

About Setting Up Workflow Rules Functionality

If you are a new customer, then the workflow rules functionality is automatically enabled. However, if you are an existing customer, then Oracle CRM On Demand Customer Care and your company administrator must configure the Oracle CRM On Demand workflow rules functionality, as follows:

- **Oracle CRM On Demand Customer Care Set-up.** When Oracle CRM On Demand Customer Care sets up the workflow rules functionality, the Workflow Configuration link is visible in the Business Process Management section of the Admin Homepage. Also, the Administrator user role has the Manage Data Rules - Manage Workflow Rules privilege enabled. For more information about user roles, see Adding Roles (on page 309).

  NOTE: To create workflow rules for the User record type, you must also have the Manage Data Rules - Manage Workflow Rules for Users privilege in your user role. Your administrator can enable this privilege for the Administrator role and for any other role as necessary. For more information about considerations when creating workflow rules for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 445).

- **Enable Workflow option.** Workflow rules cannot be executed until the company administrator selects the Enable Workflow check box on the Company Profile page. For information about configuring your company profile, see Setting Up Your Company Profile and Global Defaults (on page 19).

- **Integration events.** An *integration event* is a mechanism for triggering external processes that are based on changes to the records in Oracle CRM On Demand, including create, update, delete, associate, dissociate, restore, and merge operations. You can specify which fields on a record that you want to track. If your company wants to use workflow rules to create integration events, then contact Oracle CRM On Demand Customer Care to request support for Integration Event Administration and to specify the total size of the integration event queues that you require. When the value changes in a tracked field, the change is recorded in the integration event. You can also specify to which integration event queues the integration events are added. For more information about managing integration events, see About Integration Events (on page 801).

- **Books.** If your company wants to use workflow rules to update the associations between records and books, contact Oracle CRM On Demand Customer Care to request support for Book Management. For more information about book management, see Book Management (on page 338).

About Workflow Rules

A *workflow rule* is an instruction to Oracle CRM On Demand to perform one or more actions automatically when a specified event occurs.

Trigger Events and Actions on Workflow Rules

A workflow rule is evaluated when the event specified on the rule (the trigger event) occurs. If the conditions on the rule are met (or if there are no conditions on the rule), then the actions specified on the rule are performed. For example, you can create a workflow rule to specify that when an opportunity is created (the workflow rule trigger event), an email is sent to the opportunity owner's manager (the workflow rule action). You can also specify that the email is sent only if the revenue on the opportunity is in excess of a certain amount (the workflow rule condition), and you can specify the content of the email.

You can also configure workflow rules so that actions are performed when a specified period of time has passed, or when a specified date and time is reached. For more information about time-based workflow actions, see About Time-Based Workflow Rules (on page 436) and About Scheduled Events (on page 449).

Workflow rules can be triggered by one of the following:

- A record is created, updated, restored, merged, or deleted.

  NOTE: An update to a record by a workflow action does not trigger new sequences of workflow rules. For example, if an Update Values action on a workflow rule for the account record type updates a field on an account record, then this change to the record does not trigger any workflow rules for the account record type, even if some of those rules have the Before Modified Record Saved trigger or the When Modified Record saved trigger events. If you want Oracle CRM On Demand to perform any additional actions as a result of the change to the record, then those actions must be configured on the same workflow rule as the action that updated the record.

- A record is associated with another record or dissociated from another record.

  Association and dissociation workflow rule triggers are supported for associations between certain record types only. For more information, see About Association and Dissociation Trigger Events (on page 429).

- A specified date and time has been reached.

NOTE: Workflow rules support cascade-delete operations and deep-delete operations. For example, when an account is deleted, any related address that is an unshared address is also deleted. The deletion of an address in turn triggers any workflow rules for the Address record type that have the Before Record Is Deleted trigger event. For more information about cascade-delete operations and deep-delete operations, see About Deleting and Restoring Records.

There are several types of trigger events for workflow rules, but each workflow rule has only one trigger event. Depending on the trigger event you select for the rule, you can specify that Oracle CRM On Demand is to perform one or more actions automatically when the workflow rule conditions are met.

The trigger event for each rule is shown on the Workflow Rules List Page and on the Workflow Rule Detail page. Depending on the type of trigger event that is selected for a workflow rule, the rule is one of the following types:

- **Pre-event workflow rule.** The workflow actions occur before the event that triggers the rule is completed.
- **Post-event workflow rule.** The workflow actions occur after the event that triggered the workflow rule has been successfully completed.
- **Scheduled event.** The scheduled event type is a subtype of the post-event rule type.

  A scheduled event is a workflow rule that is not triggered by a user action. Instead, the scheduled event is automatically executed when a specified date and time is reached. You can optionally configure a scheduled event to be executed multiple times, at an interval that you specify on the scheduled event.

  For more information about scheduled events, see About Scheduled Events (on page 449) and Creating Scheduled Events (on page 451).

Workflow rules are configured for a record as a whole, and not for individual fields. Scheduled events are configured for lists of records.

NOTE: After a rule is created, you cannot change the record type or trigger event on the rule. However, if there is a condition on the rule, then you can update the condition. On scheduled events, you can update the schedule or select a different list.

The following table shows the actions that are available for each trigger event.

Trigger Event	Rule Type	Available Actions
When New Record Saved	Post-event	■ Send Email ■ Create Task ■ Assign a Book ■ Create Integration Event ■ Wait ■ Update Values
When Modified Record Saved	Post-event	■ Send Email ■ Create Task ■ Assign a Book

Trigger Event	Rule Type	Available Actions
		■ Create Integration Event ■ Wait ■ Update Values
Before Record Is Deleted	Pre-event	■ Send Email ■ Create Task ■ Create Integration Event
Before Modified Record Saved	Pre-event	■ Update Values
After Association With Parent	Post-event	■ Send Email ■ Create Integration Event ■ Wait
After Dissociation From Parent	Post-event	■ Send Email ■ Create Integration Event ■ Wait
When Record Is Restored	Post-event	■ Send Email ■ Create Integration Event ■ Create Task
When Records Are Merged	Post-event	■ Send Email ■ Create Integration Event ■ Create Task
Scheduled Event	Scheduled event	■ Send Email ■ Create Task ■ Assign a Book ■ Wait ■ Update Values

Some additional workflow actions are available for Oracle CRM On Demand Life Sciences Edition and Oracle CRM On Demand for Partner Relationship Management. For more information, see About Workflow Actions (on page 434).

NOTE: Processing of blocked products is not supported for sample request items when you use workflows in Oracle CRM On Demand. For more information, see About Sample Request Item Workflows and Blocked Product Rules.

NOTE: For certain record types, workflow rules that are configured with the When Record is Restored trigger event are never triggered because it is currently not possible to restore a record of that type. For example, it is currently not possible to restore an account team record. If support for restoring such record types is added

in the future, then any workflow rules that are configured with the When Record is Restored trigger event will be triggered where appropriate.

Restrictions That Apply to Workflow Rules and Rule Actions

The following restrictions apply to workflow rules with any trigger event other than Scheduled Event, and to the actions on those rules:

- **Workflow rule conditions.** If you define conditions on a workflow rule, then the workflow rule actions are performed only if the rule conditions are met when the rule is triggered. If the conditions are not met, then the actions are not performed. If you do not define any conditions on a workflow rule, then the workflow rule actions are performed each time the rule is triggered.
- **Single-record context.** A workflow rule that is triggered when a record is created, updated or deleted can only work in the context of a single record, that is, such a workflow rule can access and update fields on only one record.

  NOTE: When a workflow rule is triggered by a record association or dissociation action, the integration event created by the workflow can contain fields from both the child record and the parent record.

The following restrictions apply to all workflow rules and scheduled events, and to the actions on those rules and scheduled events:

- **Multiple actions on workflow rules and scheduled events.** You can create multiple actions for a workflow rule or scheduled event, up to a maximum of 25 actions for each rule or scheduled event. If you try to create more than 25 actions on a rule or scheduled event, then you receive an error message.

  NOTE: If a workflow action on a workflow rule or scheduled event terminates unexpectedly without being completed, then the remaining actions on the workflow rule or scheduled event might not be performed. For information about what happens when a workflow action fails, see About Workflow Rule and Workflow Action Failures (on page 439).
- **Record types.** You can create workflow rules and scheduled events for a number of record types. However, each workflow rule or scheduled event applies to only one record type. This means that if you create a workflow rule or scheduled event for a specific record type and you want the same action to occur for another record type, then you must create a second, similar workflow rule or scheduled event for the second record type.

Workflow Rule Order

When you create a workflow rule, Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules that are based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for rules that are based on the same record type, the same trigger event, and the same parent record type. For workflow rules that have a trigger event other than Scheduled Event, the order number 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. You can change the order of your rules.

NOTE: Workflow rules that have the Scheduled Event trigger event are also assigned an order number but they are not performed in sequence. The order number is read-only for scheduled events.

For more information about changing the order of workflow rules, see Changing the Order of Workflow Rules (on page 490).

Exiting a Sequence of Workflow Rules

For workflow rules with any trigger event other than Scheduled Event, you can specify that Oracle CRM On Demand is to stop processing a sequence of workflow rules if the condition on a workflow rule is met. When a workflow rule is triggered, the condition on the rule is evaluated. If the condition on the rule is met and the Exit check box on the workflow rule is selected, then the active actions on the current workflow rule are performed, but the subsequent workflow rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type, are not processed.

Workflow Action Order

Where there are multiple actions on a workflow rule or scheduled event, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule. For more information about workflow actions, see About Workflow Actions (on page 434).

For a scheduled event, the actions are performed for the records that are returned by the filtered list on that date. The records are processed in sequence, that is, all of the workflow actions on the scheduled event are performed in the order specified on the scheduled event for the first record in the list, then all of the actions are performed for the second record in the list, and so on.

Workflow Rule and Workflow Action Failures

If a workflow rule, scheduled event, or workflow action fails to complete, then depending on the type of trigger event on the workflow rule or scheduled event, and on the type of error, the failure is either reported in the Workflow Error Monitor, or reported to the user whose actions triggered the workflow rule. For more information, see About Workflow Rule and Workflow Action Failures (on page 439).

Record Visibility and Workflow Actions

When a user performs an action that triggers a workflow rule, some of the actions on the workflow rule can fail if the user's action resulted in the user losing visibility to the record.

For example, you might have a workflow rule that is triggered when a modified account record is saved. If a user who owns an account record reassigns the account to another user, then the workflow rule is triggered when the account record is saved. If the original owner of the record no longer has visibility to the account record through any other means, such as team or book membership, then any workflow action that requires access to the account record fails.

Similarly, an instance of a scheduled event fails if the user who made the scheduled event active no longer has access to the list that was selected on the scheduled event.

Record Ownership Modes and Workflow Actions

You can configure record types that support custom books in different ownership modes: user mode, mixed mode, or book mode. For more information about records ownership modes, see About Record Ownership Modes (on page 346). The record ownership mode interacts with workflow rules and actions.

If an Assign a Book workflow action attempts to remove the primary custom book from a record, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in mixed mode, then Oracle CRM On Demand removes the value in the Book field on the record when the primary custom book is removed from the record.
- If the record type is configured in user mode, then none of the books on the record is a primary custom book, and the record ownership mode does not impact the workflow action.

If a workflow action has a dependency on the value in the Owner field on a record, such as when a Send Email action is configured to send email using the Relative User on Record option, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in user mode or mixed mode, and the field that identifies the relative user on the record is blank, then the workflow action fails.

  For example, if you configure a Send Email action to send email to an account owner and the Account record type is configured in mixed mode, then the workflow action fails if the Owner field on the account record is blank. However, if the Owner field is populated, then the workflow action succeeds.

Latency

Workflow rules with any trigger event other than the Scheduled Event trigger event are evaluated in sequence and synchronously. The overall update operation is not completed until all the rules are evaluated. Therefore, the workflow rules add a certain amount of latency to operations (that is, the time between the start of an operation and its completion). For example, each task created by a workflow rule can add as much as 20% latency to a record update operation. Each email created by a workflow rule adds about 5% latency.

Expressions take less time to evaluate. To minimise latency, add mutually exclusive expressions to your workflow conditions. Build your workflow rules incrementally, keeping performance in mind.

Click a topic to see step-by-step procedures for performing the following:

- Creating Workflow Rules (on page 446)
- Creating Scheduled Events (on page 451)
- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)
- Changing the Order of Workflow Rule Actions (on page 489)
- Changing the Order of Workflow Rules (on page 490)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

About Association and Dissociation Trigger Events

Association and dissociation trigger events on workflow rules are supported for associations between certain record types only. The following actions are available for association and dissociation trigger events:

- **Send Email.** This action is available for all association and dissociation trigger events.
- **Wait.** This action is available for all association and dissociation trigger events.
- **Create Integration Event.** This action is available for some associations and dissociations only.

The following table lists the associations that support association and dissociation trigger events and indicates which of the associations and dissociations support the Create Integration Event action.

Parent Record Type	Record Type	Create Integration Event Action Supported
Account	Address	Yes
Account	Contact	Yes
Account	Custom Object 01	No
Account	Custom Object 02	No
Account	Custom Object 03	No
Activity	Contact	No
Contact	Account	Yes
Contact	Address	Yes
Contact	Custom Object 01	No
Contact	Custom Object 02	No
Contact	Custom Object 03	No
Contact	Opportunity	Yes
Opportunity	Contact	Yes
Opportunity	Custom Object 02	No

The following table lists the actions that can trigger an association or dissociation workflow rule. It also shows the integration events that are generated by the workflow rule in each case (if an integration event action is configured on the workflow rule).

NOTE: Depending on the data in the records, additional integration events can be generated. For example, if a new contact created on an account is the primary contact for the account, an additional (account update) integration event is generated.

Action	Parent Record	Child Record	Channel	Integration Event

Action	Parent Record	Child Record	Channel	Integration Event
Create a new account with an unshared address.	Account	Address	User Interface	Account: Insert Address: Insert Address: Associate
			Web Services	Account: Insert Address: Insert Address: Associate
Create an unshared address for an existing account.	Account	Address	User Interface	Address: Insert Account: Update Address: Associate
			Web Services	Address: Insert Account: Update Address: Associate
Remove an unshared address from an account.	Account	Address	User Interface	Address: Delete Account: Update
			Web Services	Address: Delete Account: Update Address: Dissociate
Create a new account with a related, existing shared address.	Account	Address	User Interface	Account: Insert
			Web Services	Account: Insert Account Address: Insert
Link an existing shared address to an existing account.	Account	Address	User Interface	Account Address: Insert
			Web Services	Account Address: Insert
Create a new shared address from the Address	Account	Address	User Interface	Account: Update Address: Insert Address: Associate

Action	Parent Record	Child Record	Channel	Integration Event
related information section of an account Detail page.			Web Services	Not Applicable
Remove a shared address from an account.	Account	Address	User Interface	Account Address: Delete Account: Update
			Web Services	Account Address: Delete
Create a new contact on an account.	Account	Contact	User Interface	Account: Update Contact : Insert Contact: Associate
			Web Services	Contact: Insert Contact: Associate Account: Update
Link an existing contact to an account.	Account	Contact	User Interface	Account Contact: Insert Contact: Update
			Web Services	Contact: Associate Account: Update
Remove a contact from an account.	Account	Contact	User Interface	Account Contact: Delete Contact: Update (primary contact only)
			Web Services	Contact: Dissociate Account: Update
Link an existing account to a contact.	Contact	Account	User Interface	Account Contact: Insert Account: Update
			Web Services	Account Contact: Insert Contact: Update
Remove an account from a	Contact	Account	User Interface	Account Contact: Delete Contact: Update

Action	Parent Record	Child Record	Channel	Integration Event
contact.				(primary contact only)
			Web Services	Account Contact: Delete Contact: Update (primary contact only)
Create a new contact with an unshared address.	Contact	Address	User Interface	Contact: Insert Address: Insert Address: Associate
			Web Services	Contact: Insert Address: Insert Address: Associate
Create an unshared address for an existing contact.	Contact	Address	User Interface	Address: Insert Contact: Update Address: Associate
			Web Services	Address: Insert Contact: Update Address: Associate
Remove an unshared address from a contact.	Contact	Address	User Interface	Address: Delete Contact: Update
			Web Services	Address: Delete Contact: Update Address: Dissociate
Create a new contact with a related existing shared address.	Contact	Address	User Interface	Contact: Insert
			Web Services	Contact: Insert Contact Address: Insert
Link an existing shared address to an existing contact.	Contact	Address	User Interface	Contact Address: Insert
			Web Services	Contact Address: Insert

Action	Parent Record	Child Record	Channel	Integration Event
Create a new shared address from the Address related information section of a contact Detail page.	Contact	Address	User Interface	Contact: Update Address: Insert Address: Associate
			Web Services	Not Applicable
Remove a shared address from a contact.	Contact	Address	User Interface	Contact Address: Delete Contact: Update
			Web Services	Contact Address: Delete
Create a new opportunity on a contact.	Contact	Opportunity	User Interface	Opportunity: Insert Opportunity: Associate
			Web Services	Opportunity: Insert Opportunity: Associate Contact: Update
Remove an opportunity from a contact.	Contact	Opportunity	User Interface	Opportunity: Dissociate
			Web Services	Opportunity: Dissociate
Create a new contact on an opportunity. **NOTE:** This action is not available through the user interface.	Opportunity	Contact	Web Services	Contact: Insert Contact: Associate
Link an existing contact to an	Opportunity	Contact	User Interface	Opportunity: Update Opportunity Contact Role: Insert

Action	Parent Record	Child Record	Channel	Integration Event
opportunity.			Web Services	Contact: Associate Opportunity: Update
Remove a contact from an opportunity.	Opportunity	Contact	User Interface	Opportunity Contact Role: Delete Opportunity: Update
			Web Services	Contact: Dissociate Opportunity: Update

About Workflow Actions

You can create multiple actions for a workflow rule, with up to a maximum of 25 actions for each rule.

You can create the following types of workflow actions:

- **Assign a Book.** The Assign a Book action assigns a book to a record when the conditions on the workflow rule are met.
- **Create Integration Event.** The Create Integration Event action sends an integration event to one or more integration queues when the conditions on the workflow rule are met and a change is detected in at least one of the fields that are tracked by the Create Integration Event action.
- **Create Task.** The Create Task action creates a task when the conditions on the workflow rule are met.
- **Send Email.** The Send Email action generates email when the conditions on the workflow rule are met. The email is automatically sent out, irrespective of whether the operation that triggered the workflow rule succeeds or fails.
- **Update Values.** The Update Values action updates fields when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what data was changed). The action is performed after the end of the wait period defined in one or more Wait actions that precede the Update Values action on the workflow rule.
- **Wait.** A Wait action causes Oracle CRM On Demand to delay the execution of other (following) actions on a workflow rule until after a wait period has passed.

  NOTE: The wait period specifies the minimum amount of time that must pass before Oracle CRM On Demand starts to execute the other actions on the workflow rule. The actual amount of time that passes before the other actions are executed might be longer, depending on the load on the Oracle CRM On Demand database and the Oracle CRM On Demand server, and also on the number of Wait actions that are pending when the wait period ends.

NOTE: If you specify more than one action for a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. After you have created the actions for the workflow rule, you can change the order of the actions. For more information, see Changing the Order of Workflow Rule Actions (on page 489).

When creating actions for workflow rules, you use Expression Builder to select fields from records and to define expressions to calculate variables. You can merge the record fields and variables in the subject and message body text of an email, the subject and description text of a task, or the new value for a field that you want to update. You can also use Expression Builder to calculate the duration or the end date and time of a wait period in Wait actions on workflow rules. Field names and variables in the expressions you define are replaced by values when the workflow rules are implemented. For more information about Expression Builder, see Expression Builder (on page 845).

NOTE: A *concatenated field* is a field that can display the values from multiple fields and can also display additional text. Concatenated fields cannot be updated through Update Values workflow actions, and cannot be included in integration events. Instead, you must use the individual fields that make up the concatenated fields.

For step-by-step procedures for creating workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)

Additional Workflow Actions for Oracle CRM On Demand for Partner Relationship Management

Three additional workflow actions are available only in Oracle CRM On Demand for Partner Relationship Management:

- Sync Partner Books
- Sync Book Partner
- Sync Owner Partner

For more information on 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 (see Oracle CRM On Demand documentation library - http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html) on Oracle Technology Network.

Additional Workflow Actions for Oracle CRM On Demand Life Sciences Edition

Two additional workflow actions are available for use in Oracle CRM On Demand Life Sciences Edition: Submit Call and Submit.

Submit Call Action

The Submit Call action must be set up by only by customers who use the Oracle CRM On Demand Disconnected Mobile Sales application to work with Oracle CRM On Demand Life Sciences Edition. For

information on the procedure to configure this workflow action, see the information on configuring the disbursement transaction workflow rule for inventory tracking in *Oracle CRM On Demand Disconnected Mobile Sales Administration Guide,* which is available from the Oracle CRM On Demand documentation library (see Oracle CRM On Demand documentation library - http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html) on Oracle Technology Network. Customers who do not use Oracle CRM On Demand Life Sciences Edition must not configure this workflow action. If they do configure this workflow action, then Activity records might be created, and the records might be set to the Submitted status and listed under Completed Activities without being in the Open state.

The Submit Call action is available for the following trigger events:

- When New Record Saved
- When Modified Record Saved

The Submit Call action must be followed by the Wait action.

Submit Action

The Submit action is available only in workflow rules for the Sample Transaction record type. The Submit action automatically submits a sample transaction record for processing by Oracle CRM On Demand and is equivalent to clicking the Submit button on a Sample Transaction Detail page in the user interface. For information about how you might use the Submit workflow action, see Setting Up the Automatic Submission of Sample Transactions (on page 839).

The Submit action is available for the When Modified Record Saved trigger event. The Submit action must be preceded by the Wait action.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

About Time-Based Workflow Rules

You can configure certain workflow rules so that actions are performed after a wait period has passed. For example, you can configure a rule so that an action on the rule is performed after the due date of a record has passed, or if a record has not been worked on for some time. There are two ways to configure time-based workflow rules:

- By configuring scheduled events. A scheduled event is a workflow rule that is not triggered by a user action. Instead, the scheduled event is automatically executed when a specified date and time is reached.

You can optionally configure a scheduled event to be executed multiple times, at an interval that you specify on the scheduled event. The workflow actions on a scheduled event are performed on a list of records, whereas the actions on other types of workflow rules are performed on a single record.

For more information about scheduled events, see About Scheduled Events (on page 449) and Creating Scheduled Events (on page 451).

- By configuring Wait actions on a workflow rule or scheduled event.

About Wait Actions

You can add one or more Wait actions to certain post-event workflow rules, including scheduled events. In each case where you want a time-based action to be performed, you create a Wait action that specifies the period of time for the delay, or the end-date and time of the delay. You can specify periods of time or dates directly, or you can create an expression to calculate the period or date. You then order the actions on the rule so that the Wait action comes immediately before the action that you want to delay. If more than one rule is required to fulfil a business process, you order the rules appropriately to achieve your objective.

NOTE: You cannot configure Wait actions on pre-event workflow rules.

About Re-evaluating Workflow Conditions After Wait Actions

When you set up a Wait action on a post-event workflow rule with any trigger event other than Scheduled Event, you can specify if the workflow rule condition is to be reevaluated when the wait period ends. If the Reevaluate Rule Conditions After Wait check box on the Wait action is selected, then after the wait period ends the record is reread and reevaluated against the condition on the workflow rule.

If the rule condition is not met (because the record has been changed during the wait period), the remaining actions on the rule are not performed. By default, the Re-evaluate Rule Conditions After Wait check box is selected on Wait actions.

If you deselect the Reevaluate Rule Conditions After Wait check box on a Wait action, then after the wait period ends the record is reread and the next action on the rule is performed without checking that the record still meets the rule condition. If you have more than one Wait action on a rule, the Reevaluate Rule Conditions After Wait check box must be selected on each Wait action where you want the rule condition to be reevaluated after the wait period ends.

NOTE: You cannot configure a condition on a scheduled event, that is, a workflow rule with the Scheduled Event trigger event. Therefore, selecting or deselecting the Reevaluate Rule Conditions After Wait check box on a Wait action on a scheduled event has no effect on the processing of the rule.

Example of Using Time-Based Workflow Rules Using Wait Actions

The following is an example of how you might configure time-based workflow rules using Wait actions. You might use time-based workflow rules differently, depending on your business model.

Three priority options are used for service requests: Standard, Urgent, and Critical. The priority of a service request is set to Standard by default when the service request is created. A business process for service escalation requires the following actions:

1. After a new service request is created, and if the status of the service request is not updated within 24 hours, the priority of the service request is changed to Urgent and an email is sent to the owner of the service request to notify the owner that the service request must be updated.

2. If another 24 hours pass without a change to the status of the service request, the following happens:
   - The Priority field on the service request is changed to Critical
   - The service request is reassigned to the original owner's manager
   - An email is sent to the original owner of the service request and to the new owner to tell them that the service request has been reassigned to the owner's manager and the Priority has been changed to Critical

To meet this requirement, the company administrator sets up a workflow rule for the service request record type, which is configured as follows:

1. The rule trigger is set to the following value: When New Record Saved.

2. The rule condition specifies that the status of the service request is not set to Pending, as follows:

   ```
   [<Status>]<>LookupValue("SR_STATUS", "Pending")
   ```

3. The following sequence of actions is on the workflow rule:

   a. A Wait action with a duration of 24 hours, with the Re-evaluate Rule Conditions After Wait check box selected

   b. An Update Values action to change the Priority field on the service request to Urgent

   c. A Send Email action to send email to the owner of the service request to notify the owner that the priority of the service request has changed to Urgent and the service request must be updated

   d. A Wait action with a duration of 24 hours, with the Re-evaluate Rule Conditions After Wait check box selected

   e. An Update Values action to change the Priority field on the service request to Critical

   f. An Update Values action to assign the original owner's manager as the new owner

   g. A Send Email action to send email to the owner of the service request and to the owner's manager to notify them that the service request has been reassigned and the priority of the service request has changed to Critical

For information about creating Wait actions and Update Values actions on workflow rules and on scheduled events, see Creating Workflow Actions: Wait (on page 486) and Creating Workflow Actions: Update Values (on page 484).

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder,

so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

About Workflow Rule and Workflow Action Failures

The behaviour that you see when a workflow rule or a workflow rule action fails depends on the following:

- Whether the workflow rule is a pre-event rule, a post-event rule, or a scheduled event. This is determined by the trigger event on the workflow rule. For more information about trigger events, see About Workflow Rules (on page 423).
- The type of error that causes the workflow rule or action to fail.

The following are some examples of errors that can cause a workflow rule or a workflow action to fail:

- A syntax error in an expression in a workflow rule condition or in a workflow action. Some syntax errors cannot be found by Expression Builder when a workflow rule or action is created.
- A semantic error in an expression in a workflow rule condition or in a workflow action. The following are examples of semantic errors that can occur:
  - A field in the expression cannot be identified by Oracle CRM On Demand because the integration tag for the field was changed after the workflow rule or workflow action was created.
  - An invalid value is specified for a picklist field in the expression.

Post-Event Workflow Rule and Workflow Action Failures

The following table describes the outcome for errors that occur in post-event workflow rules and the workflow actions on those rules.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Syntax error in a workflow rule condition	■ None of the actions on the workflow rule are performed. ■ The failure is reported in the	Details of the workflow rule on which the error was found, along with

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
	Workflow Error Monitor. - None of the workflow rules configured for the same record type and trigger event are triggered. - The operation that triggered the workflow rule is not affected by the failure of the rule.	details of the error.
Syntax error in a workflow action	- The workflow action fails. - The failure is reported in the Workflow Error Monitor. - If other actions exist on the workflow rule, then those actions are performed. - If any other workflow rules exist for the same record type and trigger event, then those rules are triggered and the actions on those rules are performed. - The operation that triggered the workflow rule is not affected by the failure of the workflow action.	Details of the workflow action on which the error was found, along with details of the error.
Semantic error in a workflow rule condition	- None of the actions on the workflow rule are performed. - The failure is reported in the Workflow Error Monitor. - If any other workflow rules exist for the same record type and trigger event, then those rules are triggered and the actions on those rules are performed. - The operation that triggered the workflow rule is not affected by the failure of the rule.	Details of the workflow rule on which the error was found, along with details of the error.
Semantic error in a workflow action	- The workflow action fails. - The failure is reported in the Workflow Error Monitor. - If other actions exist on the workflow rule, then those actions are performed.	Details of the workflow action on which the error was found, along with details of the error.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
	■ If any other workflow rules exist for the same record type and trigger event, then those rules are triggered and the actions on those rules are performed. ■ The operation that triggered the workflow rule is not affected by the failure of the workflow action.	
Any other error in a workflow action	■ The workflow action fails. ■ The failure is reported in the Workflow Error Monitor. ■ If other actions exist on the workflow rule, then those actions are performed. ■ If any other workflow rules exist for the same record type and trigger event, then those rules are triggered and the actions on those rules are performed. ■ The operation that triggered the workflow rule is not affected by the failure of the workflow action.	Details of the workflow action that failed, along with details of the error.

Pre-Event Workflow Rule and Workflow Action Failures

The following table describes the outcome for errors that occur in pre-event workflow rules and the workflow actions on those rules.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Syntax error in a workflow rule condition or a workflow action	■ None of the actions on the workflow rule are performed. ■ The failure is reported in the Workflow Error Monitor. ■ None of the workflow rules configured for the same record type and trigger event are triggered. ■ The operation that triggered the workflow rule is not affected by the failure of the rule.	Details of the workflow rule or the workflow action that contains the first syntax error that was encountered, along with details of the error.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Semantic error in a workflow rule condition	■ None of the actions on the workflow rule are performed. ■ The failure is reported in the Workflow Error Monitor. ■ If the rule was triggered by a delete operation, then the record is deleted. ■ If the rule was triggered by an update operation, then the updated record is saved, unless the Cancel Save check box is selected on the workflow rule. If the Cancel Save check box is selected on the workflow rule, then the update operation that triggered the workflow rule is cancelled in the same way that an update operation is cancelled if the condition on the rule is not met. For details of what happens when an update operation is cancelled by the workflow Cancel Save functionality, see Cancelling Workflow Save Operations (on page 455).	Details of the workflow rule on which the error was found, along with details of the error.
Semantic error in a workflow action	■ If any Update Values actions or Create Integration Event actions on the workflow rule were already performed, then those actions are rolled back. Any remaining actions on the workflow rule are not performed. **NOTE:** If any Create Task actions or Send Email actions were already performed, then those actions are not rolled back. ■ The error is reported back to the user whose action triggered the workflow rule. If the workflow rule was triggered by a Web service, then the failure of the workflow action is reported in the response to the Web service. ■ The operation that triggered the rule is blocked.	Not applicable

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Any other error in a workflow action	■ None of the remaining actions on the workflow rule are performed. ■ The error is reported back to the user whose action triggered the workflow rule. If the workflow rule was triggered by a Web service, then the failure of the workflow action is reported in the response to the Web service. ■ The operation that triggered the rule is blocked.	Not applicable

Scheduled Event and Workflow Action Failures

The following table describes the outcome for errors that occur in scheduled events and the workflow actions on those scheduled events.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Syntax error in a workflow action	■ The workflow action fails for each record in the list. ■ An instance is reported in the Workflow Error Monitor for each failure. ■ If other actions exist on the scheduled event, then those actions are performed. ■ The failure of the workflow action does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	Details of the workflow action that contains the syntax error that was encountered, along with details of the error.
Semantic error in a workflow action	■ The workflow action fails for each record in the list. ■ An instance is reported in the Workflow Error Monitor for each failure. ■ If other actions exist on the scheduled event, then those actions are performed. ■ The failure of the workflow action	Details of the workflow action on which the error was found, along with details of the error.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
	does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	
The number of records returned in the list specified on the scheduled event exceeds the maximum number allowed.	■ None of the actions on the scheduled event are performed for any record in the list. ■ The failure is reported in the Workflow Error Monitor. A single instance is reported. ■ The failure does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	Details of the scheduled event that failed, along with details of the error.
The user who made the scheduled event active does not have access to the list specified on the scheduled event.	■ None of the actions on the scheduled event are performed for any record in the list. ■ The failure is reported in the Workflow Error Monitor. A single instance is reported. ■ The failure does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	Details of the scheduled event that failed, along with details of the error.
Any other error in a workflow action	■ The workflow action fails for each record in the list. ■ An instance is reported in the Workflow Error Monitor for each failure. ■ If other actions exist on the scheduled event, then those actions are performed. ■ The failure of the workflow action does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	Details of the workflow action that failed, along with details of the error.

NOTE: After an instance of a scheduled event fails, another instance is generated for the next scheduled occurrence of the event. You cannot resubmit a failed instance.

Considerations When Creating Workflow Rules for the User Record Type

The following considerations apply when you create workflow rules for the User record type:

- To create workflow rules for the User record type, you must have both of the following privileges enabled in your user role:
  - Manage Data Rules - Manage Workflow Rule
  - Manage Data Rules - Manage Workflow Rules for Users
- Workflow rules for the User record type are not triggered in the following cases:
  - When changes are made to a user record by Oracle CRM On Demand Customer Care at the request of your company.

    NOTE: Users can grant sign-in access to Oracle CRM On Demand technical support representatives for troubleshooting purposes. If a technical support representative makes a change to a user record while signed in as a user, then that change is treated as if it was made by the user that the technical support representative is impersonating, and the change triggers any relevant workflow rules.
  - When a user's password is reset by the administrator clicking Reset Password on the user's record.

    NOTE: If the administrator selects the Email Temporary Password When I Click Save check box on the user record, then this action is considered to be an update to the user record, and the change triggers any relevant workflow rules.
  - When a user's password is reset through Web services.
  - When a user sets up her password after signing in to Oracle CRM On Demand for the first time.
  - When a user changes his password.
  - When a user sets up her security questions after signing in to Oracle CRM On Demand for the first time.
  - When a user changes his security questions.
  - When a change is made to a sales quota on a user record.
- The Assign a Book workflow action is not supported for workflow rules for the User record type. This is because custom books are not assigned to user records in the same way that they are assigned to other record types such as accounts, contacts, and so on. Although users can be associated with books to give users access to the records in the books, only the user's default user book is assigned to the user record.
- You cannot use an Update Values workflow action to update the Status field on a user record.
- If a workflow rule for the User record type has an Update Values action, and if the workflow rule is triggered by a change that is made to the user record through the My Set-up link, then the Update Values action does not update any fields that are read-only for the user.
- When you create a Send Email workflow action for the User record type, the Specific Email Address option is not available in the To field. Only the Specific User and Relative User on Record options are available. For the Relative User on Record option, you can select one of the following options:
  - **Current User.** This is the user whose action triggered the workflow rule.

- **Supervisor.** This is the user who is named in the Supervisor field on the user record that was created or updated by the action that triggered the workflow rule.
- **Reports To.** This is the user who is named in the Reports To field on the user record that was created or updated by the action that triggered the workflow rule.

Similarly, when you create a Create Task workflow action for the User record type, the options that are available for the Relative User on Record option in the Owner field are Current User, Supervisor, and Reports To.

Creating Workflow Rules

This topic describes how to create workflow rules with any trigger event other than Scheduled Event. For information about creating workflow rules with the Scheduled Event trigger event, see Creating Scheduled Events (on page 451).

NOTE: If the Enable Language Translation Support for Workflow Cancel Save Message check box is selected on the company profile, then the Translation Language field is available in the Workflow Rule Detail page and in the Workflow Rule Edit page when you edit an existing workflow rule. The Translation Language field allows you to enter translated versions of the custom error messages that are returned to users or Web services if the condition on a workflow rule is not met and the Cancel Save check box is selected for the rule. For more information about the Translation Language field, see Cancelling Workflow Save Operations (on page 455).

Before you begin. Workflow functionality in Oracle CRM On Demand must be set up for your company, as described in About Workflow Rules (on page 423). To perform the procedures described in this topic, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. To create workflow rules for the User record type, you must also have the Manage Data Rules - Manage Workflow Rules for Users privilege in your user role. Your administrator can enable this privilege for the Administrator role and for any other role as necessary. For more information about considerations when creating workflow rules for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 445). For information about adding privileges to roles, see Adding Roles (on page 309).

NOTE: After a rule is created, you cannot change the record type or trigger event on the rule. However, you can update the workflow condition.

To create a workflow rule

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, do one of the following:
   - To create a new workflow rule by copying an existing one, click Copy on the workflow rule that you want to copy.
   - To create a new workflow rule that is not based on an existing rule, click New on the title bar.
4. In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the rule information.

   The following table describes the rule fields.

Field	Description
Workflow Name	Enter a unique name, up to 50 characters.
Active	Use the Active check box to enable and disable the rule. Any number of workflow rules can be active at the same time.
Order	This field is read-only when you create the workflow rule. It determines the order in which Oracle CRM On Demand invokes the rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type. Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules based on the same record type, the same trigger event, and the same parent record type. Later, you can change the order of the workflow rules. For more information, see Changing the Order of Workflow Rules (on page 490).
Exit	If you select the Exit check box on this workflow rule, and if the condition on the rule is met, then the active actions on this workflow rule are performed. However, none of the subsequent workflow rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type, are triggered. If the condition on this workflow rule is not met, then Oracle CRM On Demand proceeds to the next rule in the sequence, regardless of the setting of the Exit check box on this workflow rule.
Description	(Optional) Enter additional information about the workflow rule, such as the purpose of the rule.
Record Type	Select the record type for the workflow rule. For create, update and delete trigger events, each workflow rule relates to one record type only. The rule is evaluated for that type of record and the actions are performed on that type of record. After a rule is created, you cannot change the record type on the rule. For workflow rules where the trigger event is After Association With Parent trigger event or After Dissociation From Parent, select the record type of the child record. For example, if you want the workflow rule to be triggered when a contact record is associated with an account record, select Contact in this field and select Account in the Parent Record Type field.
Trigger Event	Select the event that triggers the rule.

Field	Description
	When this event occurs on a record of the specified type, the rule is evaluated. After a rule is created, you cannot change the trigger event on the rule. **NOTE:** The trigger events After Association With Parent and After Dissociation From Parent are supported only for the Account, Contact, and Opportunity record types. For more information, see About Association and Dissociation Trigger Events (on page 429).
Parent Record Type	This field is displayed if you select the After Association With Parent trigger event or the After Dissociation From Parent trigger event. Select the parent record type. For example, if you are setting up a workflow rule that will be triggered when a contact record is associated with a parent account record, select Account in this field and select Contact in the Record Type field.

5 If you want to define a condition on the workflow rule, click the *fx* icon in the Workflow Rule Condition section of the page, and use Expression Builder to define the workflow rule condition. For more information about Expression Builder, see Expression Builder (on page 845).

NOTE: If you do not define any condition for the workflow rule, the actions on the rule will be performed each time the rule is triggered.

When creating conditions on workflow rules, note the following points:

- A workflow rule condition can contain a maximum of 2048 characters.
- You can configure workflow rules that are specific to particular roles or channels. For more information about restricting workflow rules to specific roles or channels, see Restricting Workflow Rules to Specific Channels or Roles (on page 458).
- You can determine if a field in a record has been updated by using a condition similar to the following in the workflow rule. In this example, the string used to determine if the field has changed is *Invalid*, but you can use any string you want, provided that the string does not exist as a value in the field that is being examined:

```
IfNull([<FieldName>], "Invalid") <> IfNull(PRE("<FieldName>"), "Invalid")
```

CAUTION: The PRE function does not return the previous value of a field if the function is used in any workflow or action that is invoked after a Wait action. For more information about the PRE() function, see PRE (on page 889).

6 If the Actions If Condition Is False section is available on the Workflow Rule Detail page, then you can specify that the save operation must be cancelled if the condition on the rule is not met.

For more information about specifying that the save operation must be cancelled if the condition on the rule is not met, see Cancelling Workflow Save Operations (on page 455).

7 Save the workflow rule.

When you have saved the rule, you can create actions for the rule. You can create multiple actions for a workflow rule, with up to a maximum of 25 actions for each rule.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

For step-by-step procedures for creating workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- Creating Scheduled Events (on page 451)
- Cancelling Workflow Save Operations (on page 455)
- Changing the Order of Workflow Rule Actions (on page 489)
- Changing the Order of Workflow Rules (on page 490)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

About Scheduled Events

A scheduled event is a workflow rule that is not triggered by a user action. Instead, the scheduled event is automatically executed when a specified date and time is reached. You can optionally configure a scheduled event to be executed multiple times, at an interval that you specify on the scheduled event. The workflow actions on a scheduled event are performed on a list of records, whereas the actions on other types of workflow rules are performed on a single record.

NOTE: The trigger event for a scheduled event is Scheduled Event.

You can create scheduled events for all of the top-level record types that support list management features, and for the Price List, Product, Product Category, and User record types.

When you create a scheduled event, you select a filtered list that returns the records for which you want the workflow actions to be performed. Each time that the scheduled event is executed, the actions are performed for the records that are returned by the filtered list on that date. The records are processed in sequence, that is, all of the workflow actions on the scheduled event are performed in the order specified on the scheduled event for the first record in the list, then all of the actions are performed for the second record in the list, and so on.

As an example, you might want Oracle CRM On Demand to send an email reminder to the owners of open activities for which the due date has passed, and you want this action to be repeated at intervals of one week. To set this up, you create a scheduled event on which you select a previously defined list that returns all open activities for which the due date has already passed. You configure the scheduled event to repeat at intervals of one week, and then create a Send Email action on the scheduled event. The first instance of the scheduled event is executed on the start date that you specified, and an email reminder is sent to the owner of each open activity for which the due date has passed. The scheduled event is then automatically executed again at intervals of one week until the end date that you specified is reached (or the event has been executed the number of times that you specified).

Occurrences of scheduled events are scheduled and executed as follows:

- After you make a scheduled event active, a pending instance is generated for the first scheduled occurrence of the event, and the status of the scheduled event is set to Scheduled. The pending instance is shown in the Workflow Wait Monitor. For information about the fields that are displayed for a pending instance, see Workflow Pending Instance Fields (on page 503).

  NOTE: The Resume Date on a pending instance of a scheduled event is the earliest possible time that the instance will be executed. Depending on the load on the Oracle CRM On Demand database and on the Oracle CRM On Demand server at that time, the instance might not be executed immediately.

- After an instance of the scheduled event is executed, the following happens:
  - If the Enable Notification check box is selected on the scheduled event, then Oracle CRM On Demand sends an email to the user who made the scheduled event active, to confirm that the instance has been executed.
  - Another instance is generated for the next scheduled occurrence of the event.
- When all instances of the scheduled event have completed, the scheduled event is deactivated (that is, the Active check box on the scheduled event is automatically deselected) and the status of the scheduled event is set to Completed.

Scheduled Event Status

The Status field on a scheduled event is updated automatically and is read-only. The following values can appear in the Status field:

- **Not Scheduled.** The scheduled event has never been made active.
- **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 was deactivated.

For more information about what happens when you delete an instance of a scheduled event from the Workflow Wait Monitor, see Deleting Pending Instances from the Workflow Wait Monitor (on page 502).

About Deleting Scheduled Events

If you delete a scheduled event before all of the scheduled occurrences of the event have been executed, then the following happens:

- If a pending instance of the scheduled event exists, then the instance is deleted from the Workflow Wait Monitor.
- If an instance of the scheduled event is currently being executed, then the instance fails. The failure is not reported in the Workflow Error Monitor.
- No further instances of the scheduled event are generated.

About Deactivating Scheduled Events

If you deactivate a scheduled event before all of the scheduled occurrences of the event have been executed, then the following happens:

- The status of the scheduled event is set to Terminated.
- If a pending instance of the scheduled event exists, then the instance is deleted from the Workflow Wait Monitor.
- If an instance of the scheduled event is currently being executed, then some of the actions might fail.

  During the time that an instance of a scheduled event is being executed, Oracle CRM On Demand checks at five-minute intervals to determine if the scheduled event is still active. If the scheduled event has been deactivated, then the instance terminates. Any action that has not already been performed fails, and the error instances for the failed actions are reported in the error monitor.
- No further instances of the scheduled event are generated.

If you select the Active check box on a scheduled event record that was previously deactivated, then the scheduled event record is treated as a new scheduled event. Depending on the schedule, one of the following happens:

- **If future occurrences are scheduled.** The status of the scheduled event is set to Scheduled and a pending instance is generated for the next scheduled occurrence. The count of occurrences of the scheduled event is reset to 1 when the instance is generated.
- **If no future occurrences are scheduled.** The Active check box on the scheduled event is automatically deselected again and the status of the scheduled event is set to Completed.

For information about creating scheduled events, see Creating Scheduled Events (on page 451).

Creating Scheduled Events

This topic describes how to create scheduled events, that is, workflow rules with the Scheduled Event trigger event. For information about creating workflow rules with any other trigger event, see Creating Workflow Rules (on page 446).

The following considerations apply when scheduling an event:

- You cannot specify a condition on a scheduled event. The scheduled instances of the event and the workflow actions on the event are always executed unless an error occurs.

  NOTE: After you select the Scheduled Event trigger event in the Workflow Rule New page, the page refreshes. The Workflow Error Condition section of the page is removed and the Schedule Details section, where you specify the schedule for the event, becomes available.

- For performance reasons, it is recommended that you avoid configuring multiple scheduled events that are scheduled to execute at the same time.

- You must specify a start date and time for the scheduled event and you must specify either an end date and time, or the number of times the event is to be executed.

  NOTE: Oracle CRM On Demand does not generate any instances for dates and times in the past even if you specify a start date and time that is in the past. For example, if you specify a start date of January 15, 2018 for a scheduled event that is to repeat 10 times at intervals of one month, and if the current date is May 30, 2018, then the first instance of the event is scheduled for June 15, 2018. Only the instances for the five occurrences in the future will be executed.

- If you specify that the scheduled event is to be executed on a certain date in the month, and if that date does not occur in a given month, then the event will not be executed in that month. For example, if you select day 29 in the month, then the event will not be executed in February, unless the year is a leap year.

The following considerations apply when selecting a list for a scheduled event:

- You cannot make the scheduled event active if you do not have access to the filtered list that is selected on the scheduled event.

- If the user who makes the scheduled event active does not have access to the list that is selected on the scheduled event at the time when an instance of the event is executed, then the instance fails.

- When an instance of the scheduled event is executed, the list that is returned includes only those records that meet the list filter criteria and are visible to the user who made the scheduled event active.

- The maximum number of records that can be processed by an instance of a scheduled event is 1000. If the list that you select on the scheduled event returns more than the maximum number allowed when an instance of the event is executed, then the instance fails. To avoid this issue, make sure that the filter on the list that you select for the scheduled event is set up in such a way that it is not likely to return a very large list of records.

- When specifying the filter for a list that you want to use for scheduled events, you can use one or more of the following functions in Date and Date/Time fields:

  - Duration()
  - Timestamp()
  - Today()

  You can use these functions with the following conditions:

  - Between
  - Equal to
  - On

- On or after
- On or before
- Not Between
- Not equal to

You can type the expression containing the functions directly into the filter value field in the list criteria. For example, to return opportunity records where the Close Date is two days later than the current date (that is, the date when the scheduled event is executed), select the Equal to condition and enter the following expression:

Today() + 2

As another example, to return lead records where the Estimated Close Date is within the next 36 hours, select the Between condition and enter the following expression:

Timestamp(), Timestamp() + Duration('P0YT36H')

For more information about these functions, see the following topics: Duration (on page 863), Timestamp (on page 894), and Today (on page 897).

Before you begin:

- Workflow functionality in Oracle CRM On Demand must be set up for your company, as described in About Setting Up Workflow Rules Functionality (on page 422).
- To perform the procedures described in this topic, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role.
- To create scheduled events for the User record type, you must also have the Manage Data Rules - Manage Workflow Rules for Users privilege in your user role. Your administrator can enable this privilege for the Administrator role and for any other role as necessary. For more information about considerations when creating scheduled events for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 445). For information about adding privileges to roles, see Adding Roles (on page 309).
- Review the information in About Scheduled Events (on page 449).

To create a scheduled event

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, do one of the following:
   - To create a new scheduled event by copying an existing one, click Copy on the scheduled event that you want to copy.
   - To create a new scheduled event that is not based on an existing one, click New on the title bar.
4. In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the scheduled event information.

   The following table describes the fields.

Field	Description
Workflow Name	Enter a unique name, up to 50 characters.
Active	Use the Active check box to activate or deactivate the scheduled event. 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. The Initiated By field is shown in the Detail page for the scheduled event after the record is saved. After the Active check box is selected on the scheduled event and the record is saved, the Initiated By field on the record is updated to show the name of the user who selected the Active check box. That user must have access to the list that is selected on the scheduled event at the time that an instance of the event is executed. Otherwise, the instance fails. The Initiated By field in all pending instances and all error instances for the scheduled event also shows the name of the user who selected the Active check box on the scheduled event. For more information about what happens when you activate or deactivate a scheduled event, see About Scheduled Events (on page 449). **NOTE:** When you make the scheduled event active, an instance is immediately generated for the first scheduled occurrence of the event. As a best practice, set up all of the workflow actions on the scheduled event before you make the event active. Otherwise, if the start time for the scheduled event is near, the first instance might be executed before you have finished setting up the workflow actions.
Description	(Optional) Enter additional information about the scheduled event, such as the purpose of the event.
Record Type	Select the record type for the scheduled event. A scheduled event relates to one record type only. After the event is created, you cannot change the record type on the event.
Trigger Event	Select Scheduled Event.
Enable Notification	Select this check box if you want Oracle CRM On Demand to send an email each time an instance of the scheduled event completes successfully, each time an instance of the event fails, and each time a pending instance of the event is deleted. The email is sent to the user who made the scheduled event active.

5 In the Schedule Details section, click the Lookup icon (magnifying glass) and then select the filtered list that returns the records on which you want the workflow actions to act.

6 In the Start Date Time field, select the date and time at which you want the first instance of the scheduled event to be executed.

7 In the Recurring field, select the interval at which you want the scheduled event to repeat, for example, Weekly.

8 In the Every field, set up the interval period for the recurring instances. For example, if you selected Weekly in the Recurring field, and if you want the instances to recur at intervals of two weeks, then enter 2 in the Every field. The minimum value that you can enter is 1.

9 If you selected Monthly in the Recurring field, then you can optionally schedule the scheduled event to execute on the last day of each month in which the event is executed, by selecting the Last day of month check box.

As an example, if you set up a scheduled event to start on April 23 and to repeat at two-monthly intervals, then the first instance of the event will be executed on April 23. The second instance will be executed on June 23, the third instance will be executed on August 23, and so on. However, if you select the Last day of the month check box, then the first instance of the event will be executed on April 30, the second instance will be executed on June 30, the third instance will be executed on August 31, and so on.

10 Specify the number of times that you want the scheduled event to be executed, or specify the end date and time, by doing one of the following:

- Select the After option and then specify the number of times that the scheduled event is to be executed. The value you enter must be greater than 0 (zero).
- Select the By Date Time option, and then select the end date and time for the scheduled event. The end date and time must be later than the start date and time.

11 Save your changes.

About Updating Scheduled Events

After a scheduled event is made active, you cannot change the schedule or select a different list on the scheduled event. However, you can terminate the scheduled event by deactivating it. After you deselect the Active check box on the scheduled event and save the record, you can edit the scheduled event to change the schedule or select a different list. When you make the scheduled event active again, it is treated as a new scheduled event.

CAUTION: When you deactivate a scheduled event, any pending instance of the event is deleted. In addition, if an instance of the scheduled event is currently being executed, then some of the actions might fail for some of the records in the list. For more information about what happens when you deactivate a scheduled event, see About Scheduled Events (on page 449).

Cancelling Workflow Save Operations

In workflow rules that have the Before Modified Record Saved trigger, you can use the Cancel Save functionality to specify that the operation to save the changes that triggered the rule is to be cancelled if the condition on the rule is not met. However, changes made by Oracle CRM On Demand are not cancelled even if you specify that the save operation is to be cancelled.

About Translating Messages for Cancelled Workflow Save Operations

When you set up the cancel save functionality on a workflow rule, you can specify a custom message that is returned to the user or Web service if the condition on the rule is not met and the Cancel Save check box is selected for the rule. Your company might want to provide translated versions of the custom message for users who do not use the company default language. The ability to enter translated versions of the custom message is controlled by the Enable Language Translation Support for Workflow Cancel Save Message check box on the company profile. If this check box is deselected on the company profile, then you cannot enter translated messages for the workflow rules.

If the Enable Language Translation Support for Workflow Cancel Save Message check box is selected on the company profile, then the behaviour is as follows:

- The Translation Language field is available in the Workflow Rule Detail page and in the Workflow Rule Edit page when you edit an existing workflow rule. After you create a workflow rule in which a custom message is specified, the message appears in a blue font and within brackets in every language other than the default language for the company. You can then edit the workflow rules to enter the translated versions of the message.

  NOTE: If you do not specify a custom message, then a default message is returned. You cannot enter translated versions of the default message.

- The Mark for Translation check box is available on the Workflow Rule Edit page and the Workflow Rule Detail page for existing workflow rules. If you change the message in an existing rule in the default language for the company, then you can use the Mark for Translation check box to indicate whether the translated versions of the message are to be replaced by the updated message, or are to remain unchanged. If you select the Mark for Translation check box, then the updated message appears in the default font in the default company language, and appears in a blue font and within brackets in every other language until you enter the translated message for the language. If you do not select the Mark for Translation check box when you update the message in the default company language, then the message changes in the default company language, but the translated messages are not changed.

  NOTE: When you create a workflow rule, the Mark for Translation check box is deselected and read-only. The Mark for Translation check box is effective only when you edit an existing workflow rule. In addition, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Field when you edit the workflow rule.

Before you begin. To perform this procedure, your user role must have the Workflow Cancel Save privilege as well as the Manage Data Rules - Manage Workflow Rules privilege.

NOTE: The Opportunity record type is an exception. You do not need to have the Workflow Cancel Save privilege in your user role to use the Cancel Save functionality in workflow rules for the Opportunity record type. Provided that your user role has the Manage Data Rules - Manage Workflow Rules privilege, you can use the Cancel Save functionality in workflow rules for the Opportunity record type that have the Before Modified Record Saved trigger.

To cancel a workflow save operation if the rule condition is not met

1. In the Workflow Rule Detail page, in the Actions If Condition Is False section of the page, select the Cancel Save check box.

2. (Optional) Specify the error message that is to be displayed when the save operation is cancelled because the rule condition is not met.

3 Save your changes.

The following table describes the options in the Actions If Condition Is False section of the Workflow Rule Detail page.

Field	Description
Mark for Translation	This check box is available only if the Enable Language Translation Support for Workflow Cancel Save Message check box is selected on the company profile. If you change the message in a workflow rule in the default language for the company, then use the Mark for Translation check box as follows: ■ If you want the translated versions of the message to be replaced by the updated message, then select the Mark for Translation check box. ■ If you want the translated versions of the message to remain unchanged, then do not select the Mark for Translations check box.
Cancel Save	If you select this check box, the following actions are performed if the rule condition is not met: ■ The workflow rule terminates. ■ All subsequent workflow rules based on the same record type that have the Before Modified Record Saved trigger event also terminate. ■ All previous changes to the state of the record, except changes made by Oracle CRM On Demand, are rolled back. ■ The record returns to its original state. However, if Oracle CRM On Demand makes an update to the record, then the change overrides the Cancel Save action. For example, if the primary contact is removed from the related contacts, then Oracle CRM On Demand updates the primary contact information on the parent opportunity record. This update by Oracle CRM On Demand overrides any Cancel Save action on the opportunity record. ■ Any subsequent workflow rules for the same record type that have the When Modified Record Saved trigger event are not triggered. ■ A message is returned as follows: ■ If the rule is triggered by a user action, then a message is displayed to the user whose action triggered the rule. ■ If the rule is invoked by a Web service, then a message is returned to the Web service as an error string. You can specify the message in the Display Message

Field	Description
	field. If this check box is deselected, then the save operation is not affected (and no message is returned) if the condition on the rule is not met. By default, the Cancel Save check box is deselected.
Display Message	In this field, you can specify the message that is returned to the user or Web service if the condition on the rule is not met, and the Cancel Save check box is selected for the rule. If you do not specify a message in this field, then a default message is returned. The maximum number of characters that the message can contain is 1999.

The following procedure describes how to enter a translated version of a message for a cancelled workflow save operation.

To enter a translated version of a message for a workflow

1. In the Workflow Rules List page, click the Edit link for the workflow rule.
2. In the Workflow Rule Edit page, in the Translation Language field, select the language for which you want to enter a translated message.

   NOTE: When you select any language other than the default company language, you cannot create a workflow rule from the Workflow Rule Edit page or the Workflow Rule Detail page. You can create a workflow rule only when the default company language is selected in the Translation Language field.
3. In the Display Message field, enter the translated message.
4. Save your changes.

Repeat this procedure for each language.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- Creating Workflow Rules (on page 446)

Restricting Workflow Rules to Specific Channels or Roles

When you create a workflow rule with any trigger event other than Scheduled Event, you can restrict the rule to specific channels or roles by adding a condition to the rule.

To prevent a channel from invoking a workflow rule

- Use the ExcludeChannel() function in the condition expression.

  For example, to prevent a large import operation from triggering a workflow rule, use the following condition in the workflow rule:

  ```
  ExcludeChannel ("Import")
  ```

  For more information about the ExcludeChannel() function, see ExcludeChannel (on page 865).

To restrict a workflow rule to a specific role

- Use the UserValue() function with the <Role> attribute in the condition expression.

  For example, to restrict a workflow rule so that it is invoked only when the role of the user whose action triggers the rule is Administrator and the Priority on the record is set to High, use the following condition in the workflow rule:

  ```
  UserValue('<Role>')="Administrator" AND [<Priority>]="High"
  ```

  For more information about the UserValue() function, see UserValue (on page 899).

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Creating Workflow Actions: Assign a Book

An Assign a Book action on a workflow rule automatically assigns a book to a record when the conditions on the workflow rule are met. You can select the specific book that is to be assigned to the record, or you can specify an expression that evaluates to the name of the book that is to be assigned to the record.

Specifying an expression that evaluates to a book name allows you to set up an Assign a Book workflow action that can assign a different book to different records, depending on the result of the expression. For example, assume that you have accounts in North America, and you also have accounts based in EMEA. You might want to set up two separate books for the different locations, and assign the appropriate book to an account depending on the location of the account. To set up this configuration, you can create two books, one named North America and the other named EMEA. You can then create a custom picklist field called Sales Location, with the values North America and EMEA, and add the custom field to the page layout for the Account record type for the appropriate roles. Then, you can create an Assign a Book workflow action that does the following when an account record is updated:

- Evaluates an expression to determine the value that is selected in the Sales Location field on the account record.
- Associates the account record with the book whose name matches the value returned by the expression.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Assign a Book action.

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 309).

To create an Assign a Book action

1. Navigate to the rule where you want to create the action:
   a. In the upper right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

      For information about searching for workflow rules in the list page, see Filtering Lists.
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Assign a Book.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
4. In the Workflow Action Edit page, enter a name for the action.
5. If you want to enable the action, select the Active check box.
6. To specify the book that is to be assigned to the records, do one of the following:
   - Click the selector button beside the Book Name field, then select the book to which you want to assign the records, and then click OK.
   - Click the *fx* icon to open Expression Builder, then create the expression that evaluates to the name of the book that is to be assigned to the records, and then click Save.

     For example, to support the configuration described earlier in this topic, select the custom Sales Location field from the list. The language-independent name of the field then appears in the expression editor with the appropriate syntax.

     NOTE: If the expression evaluates to a null value or a value that is not a valid book name, then the workflow action fails, and an error is recorded in the Workflow Error Monitor.

     For information about Expression Builder, see Expression Builder (on page 845).
7. Select the appropriate Assignment Option and Apply To option.

   For a description of the options, see Assigning Records to Books (on page 378).

   NOTE: If you want the workflow action to reassign the records from one book to a different book, then you can specify the book that is to be replaced in the Replace Book field. You can select the name of the book to be replaced, or you can use Expression Builder to create an expression that

evaluates to the name of the book that is to be replaced. If the expression evaluates to a null value or a value that is not a valid book name, then the workflow action fails, and an error is recorded in the Workflow Error Monitor.

8 Save the action.

Record Ownership Modes and Assigning Books

You can configure record types that support custom books in different ownership modes: user mode, mixed mode, or book mode. For more information about records ownership modes, see About Record Ownership Modes (on page 346). The record ownership mode interacts with workflow rules and actions.

If an Assign a Book workflow action attempts to remove the primary custom book from a record, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in mixed mode, then Oracle CRM On Demand removes the value in the Book field on the record when the primary custom book is removed from the record.
- If the record type is configured in user mode, then none of the books on the record is a primary custom book, and the record ownership mode does not impact the workflow action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

Creating Workflow Actions: Create Integration Event

A Create Integration Event action on a workflow rule automatically sends an integration event to one or more integration queues when the conditions on the workflow rule are met and a change is detected in at least one of the fields that are tracked by the Create Integration Event action.

About Create Integration Event Actions and Wait Actions

If you want to use a Create Integration Event action to create an integration event that captures the changes made to a record by the event that triggers a workflow rule, then you must place the Create Integration Event action before any Wait action in the sequence of actions on the workflow rule. If a Wait action precedes a Create Integration Event action on a workflow rule, then the Wait action prevents the Create Integration Event action from detecting changes to the record. When the waiting period on the Wait action ends, the record is read again before the remaining actions on the rule are performed, and the values of the fields on the record before the event that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of a field are considered to be the same, and the Create Integration Event action does not create an integration event because it does not detect any change in the tracked fields.

About Picklist Value Formats in Integration Events

Depending on how you set up your integration event queues, the values in picklist fields in the integration events are recorded either in the language of the user whose action causes the integration event to be created, or as language-independent code (LIC) values. For information about specifying the picklist value format for an integration event queue, see Creating Integration Event Queues (on page 802) and Managing Integration Event Settings (on page 803).

About the Billing, Shipping, and Primary Flags in Account and Contact Address Records

In integration events for the Account Address record type, you can include the Billing and Shipping flags that indicate whether an address is the designated billing address or shipping address for the account. Similarly, in integration events for the Contact Address record type, you can include the Primary flag that indicates whether an address is the primary address for the contact. However, you cannot track changes to the Billing, Shipping, and Primary flags. This means that changes to these flags cannot be used to trigger the creation of integration events, even if you select the Always Include check box for the flags. If you include one of these flags in an integration event, and if that flag is changed at the same time as a field for which the changes are tracked, then the integration event that is created as a result of the change to the tracked field does not show the new value of the flag. Instead, the integration event shows the value of the flag before the update was made. However, the next time that an integration event is created as a result of a change to a tracked field, the integration event includes the value of the flag field after the previous update was made.

For example, assume that you have two addresses, Address A and Address B, linked to a contact called Jane Smith. Address A is the primary address for Jane Smith. You have a workflow Create Integration Event action for the Contact Address record type that is configured as follows:

- The Track Changes check box is selected for the Address Type field only.
- The Always Include check box is selected for the Primary field.

If a user updates the Address Type field on Address A from the contact address record for Jane Smith and also deselects the Primary check box for Address A, then the integration event that the workflow action creates as

a result of the change to the Address Type field shows the new address type, but the value of the Primary flag in the integration event still indicates that the Address A is the primary address for Jane Smith. However, the next time that the Address Type field on Address A from the contact address record is changed and an integration event is created as a result of the change, the Primary flag in the integration event shows that Address A is not the primary address for Jane Smith.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Create Integration Event action.

Before you begin. To perform the procedure described here, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 309).

To create a Create Integration Event action

1. Navigate to the rule where you want to create the action:
   a. In the upper right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

      For information about searching for workflow rules in the list page, see Filtering Lists.
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Create Integration Event.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
4. In the Workflow Action Edit page, enter a name for the action.
5. If you want to enable the action, select the Active check box.
6. Select the integration queues to which the integration events will be written.
7. In the Schema Version field, if the record type for the workflow rule supports the schema for both Web Services v1.0 and Web Services v2.0, then select the Web service version that is to be used for the integration events.

   If the record type for the workflow rule supports the schema for both Web Services v1.0 and Web Services v2.0, then Web Services v2.0 is selected by default in the Schema Version field, but you can change the selection before you save the workflow action.

   NOTE: After you create and save the workflow action, you cannot change the value in the Schema Version field.

If the record type for the workflow rule supports only one schema, then that Web service version is selected by default. For more information about the Web services, see Oracle Web Services On Demand Guide.

8 Save the workflow action.

9 From the record-level menu in the list of actions, select Configure for the integration event action that you want to configure.

NOTE: The Configure option is not available for actions where the trigger event is When Records Are Merged.

10 In the Configure Integration Event Tracking page, select the check boxes for the fields, as needed:

- Select the Always Include check box if you want the field to be included in the integration event even if the value of the field has not been changed.
- Select the Track Changes check box if you want an integration event to be generated each time this field is updated.

11 Save your changes.

The following table describes the fields on the Configure Integration Event Tracking page.

Field	Description
Display Name	The name of the field as it is displayed in the user interface.
Integration Tag	The integration tag that is used when the field is included in the integration event. Integration tags are displayed in the Integration Tag Web Services v2.0 column in the *record type* Fields page.
Required	This read-only check box indicates if the field has been set up as a required field.
Always Include	Select this check box if you want the field to be included in the integration event even if the value of the field has not been changed. **NOTE:** The Always Include check box is selected by default and cannot be deselected for certain fields used by Oracle CRM On Demand.
Track Changes	Select this check box if you want an integration event to be generated each time that this field is updated. For more information about the Track Changes check box, see *About the Track Changes Check Box* in this topic.

About the Track Changes Check Box

The Track Changes check box is not available if the trigger event for the workflow rule is Before Record Is Deleted, After Association With Parent, or After Dissociation From Parent. Also, if the trigger event for the workflow rule is After Association With Parent, or After Dissociation From Parent, then the set of fields

displayed on the page will be the set of fields at the child record level. You cannot configure the set of fields included in the integration event at the parent record level.

For workflow actions on which the Track Changes check box is available, the workflow action creates an integration event only if the Track Changes check box is selected for at least one field, and if a change is detected in at least one of the fields for which the Track Changes check box is selected. When the integration event is created, all of the fields that have the Always Include check box selected in the workflow action are included in the integration event.

System Field Exceptions

If the trigger event for the workflow rule is anything other than When New Record Saved, then Oracle CRM On Demand does not generate integration events in cases where the Track Changes check box is selected for one or more of the following system fields, and the Track Changes check box is not selected for any other field:

- ModifiedDate
- ModifiedById
- CreatedDate
- CreatedById
- Id

For more information about integration events, see About Integration Events (on page 801).

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)

Related Topics

See the following topics for related information about workflows:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)
- About Integration Events (on page 801)

Creating Workflow Actions: Create Task

A Create Task action on a workflow rule creates a task automatically when the conditions on the workflow rule are met.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

About Configuring Workflow Rules to Create Follow-Up Tasks for Activities

The Create Task action is available for the Activity record type so that you can configure workflow rules to create follow-up tasks when new activity records are saved or existing activity records are updated, deleted, or restored. Follow-up tasks that are created for activity records do not trigger any subsequent workflow rules that are based on the Activity record type. For more information, see Example of Configuring Workflow Rules to Create Follow-Up Tasks for Activities (on page 470).

Tasks Linked to Parent Records

If a workflow rule is based on a record type that supports child tasks, then when a Create Task action on the rule creates a task, the record that triggered the workflow rule becomes the parent record for the new child task record. In addition, activities created by workflow rule actions are automatically linked to other parent records as follows:

- When a Create Task action creates an activity for an opportunity record, the workflow action automatically links the activity to the parent account for the opportunity as well as to the opportunity record itself.
- When a Create Task action creates an activity for a service request record, the workflow action automatically links the activity to the parent account and the contact for the service request, as well as to the service request record itself.

If a workflow rule is based on a record type that does not support child tasks, then when a Create Task action on the rule creates a task, the task is not linked to any parent record.

The following procedure describes how to create a Create Task action.

NOTE: For a Create Task action to succeed, the user whose actions trigger the workflow rule must have the appropriate access rights to create a task. For information about what happens when a workflow action fails, see About Workflow Rule and Workflow Action Failures (on page 439).

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 309).

To create a Create Task action

1. Navigate to the rule where you want to create the action:
   a. In the upper right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

For information about searching for workflow rules in the list page, see Filtering Lists.

2 Click the Workflow Name link on the rule.

3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Create Task.

NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

4 In the Workflow Action Edit page, enter a name for the action.

5 If you want to enable the action, select the Active check box.

6 Fill in the fields described in the following table, and then save the action.

NOTE: If you select the Relative User on Record option in the Owner field for the task, and the owner of the record is an inactive user, the task will not be created.

Field	Description
Owner	Select the type of owner for the task (Relative User on Record or Specific User), and then select the owner: ■ If you select Relative User on Record, select the user from the list. If you select a team role as the owner, the workflow rule creates a task for each user who has the assigned team role. **NOTE:** For the Account, Contact, Lead, Opportunity, and Service Request record types, any custom team roles that are added to the record type are available for selection in the list of Relative User on Record owners. For more information on customising record types, see Record Type Application Customisation Page (on page 104). For information about which users you can select in the Owner field when the workflow action is for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 445). ■ If you select Specific User, click the Lookup icon and select the task owner. **NOTE:** For information about how record ownership modes affect the ownership of automatically generated tasks, see Record Ownership Modes and Automatically Generated Tasks (on page 351).
Type	Select the activity type from the drop-down list.
Activity Subtype	Select the activity subtype from the drop-down list.

Field	Description
Due Date	Enter an expression that evaluates to the due date for the task. You can use Expression Builder to create the expression. Click the *fx* icon beside the field to open the Expression Builder window. The expression can contain a maximum of 1024 characters. **NOTE:** For the workflow action to work correctly, the Due Date field must contain an expression that evaluates to a valid date. Do not enter anything else, such as a date or an integer, in the Due Date field. If the expression that you enter evaluates to a date that is before or the same as the current date, then the due date is the current date by default. There is no limit on how far in the future the calculated date can be set. However, the expression must evaluate to a valid date. If the expression evaluates to an invalid date or to any other data type, such as string, integer, or Boolean, then an error occurs, and the activity is not created. You can use the Check Syntax button in Expression Builder to test the syntax of the expression. However, Expression Builder does not verify that the expression evaluates to a valid date. For information about using Oracle On Demand Expression Builder, see Expression Builder (on page 845).
Priority	Select the activity priority from the drop-down list.
Status	Select the activity status from the drop-down list.
Task Currency	Select a currency.
Private	Select this checkbox if you want the task to be visible to the task owner only.
Subject	Enter the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string. For example, the text might include the following: `Call %%%[<ContactLastName>]%%%` If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added. If you use Expression Builder to embed a complex expression, the percent signs might not be added at the appropriate places. In that case, ensure that the percent signs are placed before and after the entire

Field	Description
	expression so that the expression is evaluated correctly. For example, `%%%Today() + 30%%%` adds 30 days to the current date, but `%%%Today() %%%+ 30` concatenates 30 to the string representation of the current date. To use Expression Builder to embed functions and field names in the field, click the *fx* icon beside the field. If you are entering only static text, you do not need to use Expression Builder. This field can contain a maximum of 1024 characters, including the percent signs before and after the expressions.
Description	Enter the description of the task. You can embed functions and field names in the text, as described for the Subject field. This field can contain a maximum of 1024 characters, including the percent signs before and after the expressions.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)

- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

Example of Configuring Workflow Rules to Create Follow-Up Tasks for Activities

This topic provides an example of configuring workflow rules to create follow-up tasks when activity records are created. You might use this functionality differently, depending on your business model.

You want a follow-up task to be created automatically each time a user creates a new activity. The follow-up task is to be set up as follows:

- The task is a call.
- The due date for the follow-up task is two days after the original task is created.
- The priority of the follow-up task is set to 1-High.
- The owner of the follow-up task is the same as the owner of the original activity.

To configure a workflow rule to create a follow-up task for a new activity

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. In the Workflow Rules List page, click New on the title bar.
4. In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the rule information, as follows:
   a. In the Workflow Name field, enter a name for the workflow rule.
   b. Select the Active check box.
   c. In the Record Type field, select Activity.
   d. In the Trigger Event field, select When New Record Saved.
5. Save the workflow rule.
6. In the Workflow Rule Details page, in the Actions title bar, click Menu, and then select Create Task.
7. In the Workflow Action Edit page, fill in the action information, as follows:
   a. In the Action Name field, enter a name for the action.
   b. Select the Active check box.
   c. In the Owner field, select Relative User on Record, then select Activity Owner.

d In the Type field, select Call.

e In the Due Date field, click the fx icon, enter the following expression in the Expression field in the Expression Builder window, and then save the expression:

Today()+2

f In the Priority field, select 1-High.

g In the Subject field, enter the subject line for the task, for example, *Follow-Up Call for New Activity*.

8 Save the workflow action.

Creating Workflow Actions: Send Email

A Send Email action on a workflow rule automatically generates email when the conditions on the workflow rule are met. The email is automatically sent out, irrespective of whether the operation that triggered the workflow rule succeeds or fails. Administrators can see a list of the outbound emails that are currently waiting to be sent in the email monitor. For more information about the email monitor, see Reviewing Your Company's Pending and Sent Emails (on page 82).

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

About the From Address in Emails Sent by Workflow Actions

When you specify the From address for the emails that are sent by a Send Email workflow action, you can select one of the following options:

- Default Email Address

  If you select this option, then the From address in the email is donotreply@crmondemand.com.

- Current User

  If you select this option, then the email is sent on behalf of the signed-in user who triggers the workflow. The Sender field in the email is set to donotreply@crmondemand.com. The From address in the email is the email address of the signed-in user who triggers the workflow.

  NOTE: When the Send Email action is performed for a scheduled event, the user who made the scheduled event active is considered to be the signed-in user.

- Specific Email Address

  If you select this option, then the email is sent on behalf of the email address that you specify on the workflow action. The Sender field in the email is set to donotreply@crmondemand.com. The From address in the email is the specific email address that you specified on the workflow action.

NOTE: Oracle CRM On Demand generates a string for each email so that the email can be tracked in the email delivery system at Oracle. In earlier releases of Oracle CRM On Demand, the tracking string was shown in the email. Starting with Release 24, the tracking string is no longer shown in the email, instead, it is stored in a header that is not visible to the email recipient.

About Translating the Subject Line and Message Body Text in Send Email Workflow Actions

After a Send Email action is created, you can optionally edit the action to enter translated versions of the subject line and message body text for the email that is generated by the workflow action. You can enter a translation for each language that is active for your company. If you do not enter a translation of the subject line and message body text for a language, then the version of the text in the default company language is used instead.

When the email action is performed, Oracle CRM On Demand uses the value in the To field of the Send Email action to determine the language for the email, as follows:

- If Specific User or Relative User on Record is selected in the To field, then the language for the email is the user language of the email recipient. If Relative User on Record is selected in the To field, and if the email is being sent to more than one user, then the language for each email is the user language of the recipient of that email.
- If Specific Email Address is selected in the To field, then Oracle CRM On Demand uses the value in the From field of the Send Email action to determine the language for the email, as follows:
  - If Current User is selected in the From field, then the language for the email is the user language of the current user, that is, the signed-in user who triggers the workflow.
  - If Default Email Address or Specific Email Address is selected in the From field, then the language for the email is the default company language.

What Happens If the Send Email Action Is Updated?

When you change the subject line text, or the message body text, or both, in the default company language, you can use the Mark for Translation check box to determine the behaviour for the other languages, as follows:

- If you do not select the Mark for Translation check box, then the following happens:
  - For the languages for which a translation was never entered, the subject line and message body text is automatically replaced by the updated text that is specified for the default company language.
  - Any existing translated versions of the subject line and message body text remain unchanged.
- If you select the Mark for Translation check box, then after you save your changes, the subject line and message body text for all of the other languages is overwritten by the subject line and message body text that is specified for the default company language. The text appears in blue font and within brackets for the other languages until you enter the translated version.

  NOTE: If you select the Mark for Translation check box when you update any field on a Send Email action, then when you save your changes, the subject line and message body text for every language is overwritten by the subject line and message body text that is specified for the default company language, even if you did not update the subject line or the message body text in the default company language.

About the Mark for Translation Check Box

The Mark for Translation check box is effective only when you edit an existing Send Email workflow action and the default company language is selected in the Translation Language field. When you create a new workflow Send Email action, the Mark for Translation check box is deselected and read-only. In addition, the Mark for

Translation check box is read-only when you select any language other than the default company language in the Translation Language field when you edit the workflow action.

The following procedure describes how to create a Send Email action.

NOTE: The workflow functionality in Oracle CRM On Demand is not intended for use as a tool for mass email sending. If you have a requirement to send a lot of email to your customers, then it is recommended that you use a product such as Oracle CRM On Demand Marketing to fulfil your requirements.

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 309).

To create a Send Email action

1. Navigate to the rule where you want to create the action:
   a. In the upper right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

      For information about searching for workflow rules in the list page, see Filtering Lists.
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Send Email.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
4. In the Workflow Action Edit page, enter a name for the action.
5. If you want to enable the action, select the Active check box.
6. In the From field, select or enter the address that the email is to be sent from, as follows:
   - Select the Default Email Address option to send the email from the default address.
   - Select the Current User option to send the email on behalf of the signed-in user who triggers the workflow.
   - Select the Specific Email Address option to send the email on behalf of a specific address, and then specify the address.

     When entering the address, the following restrictions apply:
     - You can enter the email address directly, or click the *fx* icon beside the field, and use Expression Builder to define the email address.
     - Specify only one email address. Multiple addresses are not supported in the From field.

- If you specify an absolute email address, you must enclose the address in single or double quotation marks.
- Expression Builder checks only the syntax of the address expressions. It does not check that the address is valid.
- This field can contain a maximum of 1024 characters.

7 (Optional) In the Reply To field, select the option for the address that automatically appears in the To field when the recipient responds to the email that is sent by the Send Email workflow action, as follows:

- Leave the field blank if you want the From address in the email to appear in the To field in the email response.
- Select the Current User option if you want the email address of the signed-in user whose action triggers the workflow rule to appear in the To field in the email response.
- Select the Specific Email Address option if you want to specify the email address or addresses that will appear in the To field in the email response, and then specify the addresses.

  When entering the addresses, the following restrictions apply:

  - You can enter the email addresses directly, or click the fx icon beside the field, and use Expression Builder to define the email addresses.
  - To enter multiple addresses, use a semi-colon (;) delimiter.
  - You must enclose absolute email addresses in single or double quotation marks.
  - Expression Builder checks only the syntax of the address expressions. It does not check that the addresses are valid.
  - This field can contain a maximum of 1024 characters.

8 In the To field, select or enter the email address of the email recipient, as follows:

- Select Specific User or Relative User on Record, and then select the recipient, as follows:
  - If you select Specific User, click the Lookup icon and select the user.
  - If you select Relative User on Record, select the recipient from the list.

  If you select a team role as the recipient, the workflow rule sends the mail to each user who has the assigned team role.

  NOTE: For the Account, Contact, Lead, Opportunity, and Service Request record types, any custom roles that are added to the record type are available in the list of Relative User on Record recipients. For more information on customising record types, see Record Type Application Customisation Page (on page 104). For information about the recipients to whom you can send email when the workflow action is for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 445).
- Select the Specific Email Address option, and then specify the addresses.

  When entering the addresses, the following considerations apply:

  - You can enter email addresses directly, or click the *fx* icon beside the field, and use Expression Builder to define email addresses.
  - To enter multiple addresses, use a semi-colon (;) delimiter.

- You must enclose absolute email addresses in single or double quotation marks.
- Expression Builder checks only the syntax of the address expressions. It does not check that the addresses are valid.
- This field can contain a maximum of 1024 characters.
- If an expression that you enter here returns an email address that contains any character that is not supported for use in email addresses in the standard application, then Oracle CRM On Demand cannot send email to that address, even if the Allow Unicode Characters in Email Fields check box is selected on the company profile. For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses.

The following example shows an entry with multiple addresses:

```
PRE('<EmailField1>') + ";" + [<EmailField1>] + ";" + "john.doe@company.com"
```

NOTE: When you create a Send Email workflow action for the User record type, the Specific Email Address option is not available in the To field. Only the Specific User and Relative User on Record options are available.

9 Enter the subject line for the email.

You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a text value.

For example, the text might include the following:

```
A new %%%[<AccountType>]%%% account has been created
```

If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added. If you use Expression Builder to embed a complex expression, the percent signs might not be added at the appropriate places. In that case, ensure that the percent signs are placed before and after the entire expression so that the expression is evaluated correctly.

For example, `%%%Today() + 30%%%` adds 30 days to the current date, but `%%%Today() %%%+ 30` concatenates 30 to the string representation of the current date.

To use Expression Builder to embed functions and field names in the field, click the *fx* icon beside the field. If you are entering only static text, you do not need to use Expression Builder.

This field can contain a maximum of 1024 characters, including the percent signs before and after the functions and field names.

10 In the Email Format field, select the format that you want to use for the email message.

You can select Plain Text or HTML for the message format.

11 Enter the message for the email.

You can embed functions and field names in the text, as described in Step 8.

For example, the text might include the following:

```
Hello Mr %%%[<ContactLastName>]%%%,
```

This field can contain a maximum of 2000 characters, including the percent signs before and after the expressions.

For information about considerations when using HTML code in the message, and a list of the elements and attributes that are supported, see HTML Code in Workflow Email Messages (on page 477).

12 Save the action.

The following procedure describes how to enter a translated version of the subject line and message body text in the email.

NOTE: If you do not enter a translation of the subject line and message body text for a language, then the version of the text in the default company language is used instead. If you later change the subject line text, or the message body text, or both, in the default company language in an existing Send Email action, and if you do not select the Mark for Translation check box, then the updates are also applied to the subject line and message body text for any language for which a translation has never been entered.

To enter a translated version of the subject line and message body text for the email

1 In the Workflow Rule Detail page, click the Edit link for the Send Email workflow action for which you want to enter the translation.

2 In the Workflow Action Edit page, in the Translation Language field, select the language for which you want to enter the translation.

3 In the Subject field, enter the translated version of the subject line of the email.

You can embed functions and field names in the text.

4 In the Message Body field, enter the translated version of the message text.

You can embed functions and field names in the text.

5 Save your changes.

6 Repeat this procedure for each language for which you want to enter a translation.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)

Related Topics

See the following topics for related information about workflows:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

HTML Code in Workflow Email Messages

When using HTML code in the Message field in an email in a workflow Send Email action, note the following points:

- When you save your workflow action, extra line breaks and spaces might be added to the email message. These extra lines and spaces do not appear in the email that is sent to the recipient.
- If an expression within the HTML email message evaluates to a string that contains an HTML tag, then when Oracle CRM On Demand sends the email, the tag is encoded so that it is treated as text rather than HTML code by the recipient's email application.

  For example, assume that an email message contains the expression %%%[{Description}]%%% to return the value of the Description field, and that the Description field contains the following HTML code:

  This is the description

  In this case, when the expression is evaluated, the tags that are returned as part of the value of the field are not interpreted as HTML code. Instead, the value of the Description field appears in the email message exactly as it appears in the Description field in Oracle CRM On Demand, including the and tags.
- If the recipient's email application does not support HTML, then the email application determines how the HTML message is displayed for that recipient.
- For the HTML email message, Oracle CRM On Demand supports a subset of the elements that are supported in HTML5. If you use an HTML element that Oracle CRM On Demand does not support for use in a workflow email message, then the tags for the unsupported element are removed from the email message when you save the workflow action. No error message appears. In the case of certain elements, the content of the element is also removed from the message.

  The rest of this topic provides details of the supported and unsupported elements.

Supported Elements and Attributes

The following table lists the elements that Oracle CRM On Demand supports for use in a workflow email message and the attributes that are supported for the elements. For information about the properties that are

supported for use with the style attribute, see the Supported Properties for the style Attribute section of this topic.

Supported Elements	Supported Attributes
<a>	■ href ■ rel ■ style
<abbr>	■ style ■ title
<address>	style
<b>	style
<bdo>	■ dir ■ style
<blockquote>	style
 	style
<caption>	style
<cite>	style
<code>	style
<col>	■ align ■ span ■ style ■ valign ■ width
<colgroup>	■ align ■ span ■ style ■ valign ■ width
<dd>	style
<del>	style
<dfn>	style
	■ align

Supported Elements	Supported Attributes
	■ style
<dl>	style
<dt>	style
	style
<fieldset>	style
<h1>	style
<h2>	style
<h3>	style
<h4>	style
<h5>	style
<h6>	style
<hr>	■ align ■ size ■ style ■ width
<i>	style
<img>	■ align ■ alt ■ border ■ height ■ hspace ■ src ■ style ■ vspace ■ width
<ins>	style
<legend>	style
	style
	style

Supported Elements	Supported Attributes
<p>	■ align ■ style
<pre>	style
<q>	style
<s>	style
<samp>	style
<small>	style
	style
	style
<sub>	style
<sup>	style
<table>	■ align ■ bgcolor ■ border ■ cellpadding ■ cellspacing ■ height ■ style ■ width
<tbody>	style
<td>	■ abbr ■ align ■ bgcolor ■ colspan ■ height ■ rowspan ■ style ■ width
<tfoot>	style

Supported Elements	Supported Attributes
<th>	■ abbr ■ align ■ bgcolor ■ colspan ■ height ■ rowspan ■ style ■ width
<thead>	style
<tr>	■ align ■ height ■ style ■ valign ■ width
<u>	style
	style
<var>	style

For more information about HTML5, see the HTML5 specification on the World Wide Web Consortium (W3C) Website https://www.w3.org/TR/html5/.

Supported Properties for the style Attribute

The following cascading style sheet (CSS) properties are supported for use with the style attribute, which can be used with all of the elements that are supported for use in the messages in workflow emails:

- color
- font-family
- font-size
- font-style
- list-style-position
- list-style-type
- text-align

If you use a property that Oracle CRM On Demand does not support for use with the style attribute, then the unsupported property is removed from the style attribute when you save the workflow action.

Unsupported Elements

If you use an HTML element that Oracle CRM On Demand does not support for use in a workflow email message, then the tags for the unsupported element are removed from the email message when you save the workflow action. No error message appears. The content of the element is retained in the message, except in the case of the following elements. For these elements, both the tags and the content of the element are removed for security reasons:

- <applet>
- <area>
- <base>
- <basefont>
- <big>
- <button>
-
- <font>
- <form>
- <frame>
- <frameset>
- <iframe>
- <input>
- <isindex>
- <label>
- <link>
- <map>
- <menu>
- <noframes>
- <noscript>
- <object>
- <optgroup>
- <option>
- <param>
- <script>
- <select>
- <strike>
- <style>
- <textarea>

- <tt>

Example of an HTML Message

The following example shows how Oracle CRM On Demand handles an HTML message in a workflow email. In this example, the workflow action sends an email to the members of a team when an opportunity with high priority is created.

The message might be entered in the Message field in the Send Email workflow action as follows:

<html>

<body>

<pre>

Team,

<big>Good News!</big>

The %%%[{Name}]%%% opportunity created by %%%[{Created By Full Name}]%%% appears to be a high potential opportunity. Please target it as a priority so that we can add it to the next quarter.

Thanks and regards,

David

</pre>

</body>

</html>

NOTE: If you do not use the <pre> element to enclose the message content, then you must use the <br> tag to specify each line break.

The email message as it was entered includes instances of the <html>, <body>, and <big> elements, which are not supported. When the workflow action is saved, the tags for the <html> and <body> elements are removed, but the contents of these elements are retained. In the case of the <big> element, both the tags and the content of the element are removed. The message then appears as follows in the saved workflow action:

<pre>

Team,

The %%%[{Name}]%%% opportunity created by %%%[{Created By Full Name}]%%% appears to be a high potential opportunity. Please target it as a priority so that we can add it to the next quarter.

Thanks and regards,

David

</pre>

When the email is sent, the message appears as follows in an email application that supports HTML:

Team,

The *Auto Manufacturer* opportunity created by Amanda Jacobsen appears to be a **high potential** opportunity. **Please target it as a priority so that we can add it to the next quarter.**

Thanks and regards,

David

Creating Workflow Actions: Update Values

An Update Values action on a workflow rule automatically updates fields when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what data was changed). The action is performed after the end of the wait period defined in one or more Wait actions, if any, that precede the Update Values action on the workflow rule.

Unless the trigger event for the workflow rule is Before Modified Record Saved, there must be at least one active Wait action that precedes the Update Values action on the workflow rule. Except on workflow rules where the trigger event is Before Modified Record Saved, Oracle CRM On Demand allows you to activate an Update Values action only if the action is preceded by at least one active Wait action on the workflow rule. Where a workflow rule has a number of Update Values actions, you do not need to have a Wait action for each Update Values action. It is sufficient to have one Wait action that precedes all of the Update Values actions on the rule.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Update Values action.

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 309).

To create an Update Values action

1. Navigate to the rule where you want to create the action:
   a. In the upper right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

      For information about searching for workflow rules in the list page, see Filtering Lists.
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Update Values.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
4. In the Workflow Action Edit page, enter a name for the action.

5 If you want to enable the action, select the Active check box.

6 Fill in the fields described in the following table, and then save the action.

Field	Description
Field Name	Select the name of the field that is to be updated from the drop-down list. **NOTE:** The set of fields that can be updated is determined by the record type for the workflow rule. Also, if a field is specified as read only at the field set-up level, then that field cannot be updated through the Update Values action. For some record types, the set of fields that can be updated includes some Custom Object fields. The Custom Object 1, Custom Object 02, and Custom Object 03 fields, and the corresponding ID fields can be updated for a number of record types. For the Opportunity record type, the Custom Object 05 and Custom Object 06 fields, and the corresponding ID fields can also be updated.
Value	Click the *fx* icon beside the field and define the expression that calculates the new value for the field. You can use the Check Syntax button in Expression Builder to test the syntax. This field can contain a maximum of 1024 characters. If you define an expression to calculate a field, such as a custom Margin field, where Margin equals Revenue minus Cost, then the field value is calculated each time the workflow rule is triggered, even if the Revenue or the Cost has not changed. For better performance, you can define an additional condition on the workflow rule, such as: `FieldValue('<Revenue>') <> PRE('<Revenue>') OR FieldValue('<Cost>') <> PRE('<Cost>')` The PRE function returns the value that was in the field before the field was updated.
Overwrite Existing Values	Select this checkbox if the existing value in the field is to be overwritten with the new value. If the field already contains a value, the value is not updated unless this check box is selected. If the field is empty, the field is updated with the new value, even if this check box is deselected.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)

- Creating Workflow Actions: Wait (on page 486)

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

Creating Workflow Actions: Wait

A Wait action causes Oracle CRM On Demand to delay the execution of other (following) actions on a workflow rule until after a wait period has passed. You can specify the wait period as a period of time, or you can specify an end date and time for the wait period. Also, you can specify the wait period directly or create an expression to calculate it.

NOTE: The wait period specifies the minimum amount of time that must pass before Oracle CRM On Demand starts to execute the other actions on the workflow rule. The actual amount of time that passes before the other actions are executed might be longer, depending on the load on the Oracle CRM On Demand database and the Oracle CRM On Demand server, and also on the number of Wait actions that are pending when the wait period ends.

About Wait Actions and Create Integration Event Actions

If you want to use a Create Integration Event action to create an integration event that captures the changes made to a record by the event that triggers a workflow rule, then you must place the Create Integration Event action before any Wait action in the sequence of actions on the workflow rule. If a Wait action precedes a Create Integration Event action on a workflow rule, then the Wait action prevents the Create Integration Event action from detecting changes to the record. When the waiting period on the Wait action ends, the record is read again before the remaining actions on the rule are performed, and the values of the fields on the record before the event that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of a field are considered to be the same, and the Create Integration Event action does not create an integration event because it does not detect any change in the tracked fields.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Wait action.

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 309).

To create a Wait action

1 Navigate to the rule where you want to create the action:

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

   b In the Business Process Management section, click Workflow Configuration.

   c On the Workflow Rules List page, find the rule where you want to create the action.

   For information about searching for workflow rules in the list page, see Filtering Lists.

2 Click the Workflow Name link on the rule.

3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Wait.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

4 In the Workflow Action Edit page, enter a name for the action.

5 If you want to enable the action, select the Active check box.

6 If you do not want Oracle CRM On Demand to re-evaluate the rule conditions after the wait period ends, deselect the Re-evaluate Rule Conditions After Wait check box.

   NOTE: For more information about the Re-evaluate Rule Conditions After Wait check box, see About Time-Based Workflow Rules (on page 436).

7 Specify the duration of the wait, using one of the following options:

- Select the Period option, and then enter the period for the delay in years, months, days, hours, and minutes, as follows:
  - In the Years field, enter a positive integer value between 0 (zero) and 5.
  - In the Months field, enter a positive integer value between 0 (zero) and 12.
  - In the Days field, enter a positive integer value between 0 (zero) and 200.
  - In the Hours field, enter a positive integer value between 0 (zero) and 200.
  - In the Minutes field, enter a positive integer value between 0 (zero) and 59.

  You cannot specify a negative value or a non-integer value such as 1.5.

  NOTE: The maximum period that you can specify using the Period option is 5 years, 12 months, 200 days, 200 hours, and 59 minutes. If you want to specify a longer period, then use the Period Expression option instead of the Period option.

- Select the Period Expression option, then click the *fx* icon beside the field, and use Expression Builder to create an expression to calculate the period for the delay.

  You can use the Duration function in Expression Builder to calculate a period in days or fractions of days. For more information, see Duration (on page 863).

The expression must evaluate to a number. The following are examples of valid expressions to calculate the period for a delay:

```
Duration('P0YT1H') + Duration('P0YT1M') + Duration('P1Y')
```

```
Duration('P0YT1H') + 1
```

```
Duration('P1YT1H') - 1
```

There is no limit on the length of the period that can be returned by the expression.

NOTE: If the calculated wait period is negative, the wait period is set to zero, and the Wait action completes immediately. Any remaining actions on the workflow rule are executed without delay.

- Select the Time option, click the calendar icon, and select the end date and time for the delay.

  Select the time according to the time zone specified in your personal settings.

- Select the Time Expression option, then click the *fx* icon beside the field, and use Expression Builder to create an expression to calculate the end date and time for the delay.

  You can use the Duration function in Expression Builder to calculate a period in days or fractions of days. For more information, see Duration (on page 863).

  The expression must evaluate to a date and time. The following are examples of valid expressions to calculate the end date and time for a delay:

  ```
  Timestamp() + Duration('P0YT5M')
  ```

  ```
  Today() + Duration('P0YT1H5M')
  ```

  NOTE: If the calculated end date and time has already passed, the wait period on the action is set to 0 (zero) and the Wait action completes immediately. Any remaining actions on the workflow rule are executed without delay.

  If the expression does not evaluate to a valid date and time, the Wait action completes immediately, and any remaining actions on the workflow rule are executed without delay.

  There is no limit on how far in the future the calculated date can be set.

8 Save the action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)

Related Topics

See the following topics for related information about workflows:

- About Workflow Rules (on page 423)

- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Deactivating Workflow Rules and Actions (on page 491)
- Deleting Workflow Rules and Actions (on page 492)

Changing the Order of Workflow Rule Actions

If there is more than one action on a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule.

To change the order of the actions on a workflow rule

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule in which you want to change the order of the actions.

   For information about searching for workflow rules in the list page, see Filtering Lists.
4. Click the Workflow Name link on the rule.
5. In the Actions title bar on the Workflow Rule Detail page, click the Edit Order button.
6. On the Edit Action Order page, click the arrow icons to do the following:
   - Move an action up or down within the list.
   - Move an action to the top or bottom of the list of actions.

   NOTE: If there is an Update Values action on the rule, then it must be preceded by at least one active Wait action on the rule unless the trigger event for the workflow rule is Before Modified Record Saved.
7. Click Save to save your changes.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)

- Creating Workflow Actions: Assign a Book (on page 459)
- Creating Workflow Actions: Create Integration Event (on page 462)
- Creating Workflow Actions: Create Task (on page 466)
- Creating Workflow Actions: Send Email (on page 471)
- Creating Workflow Actions: Update Values (on page 484)
- Creating Workflow Actions: Wait (on page 486)

Changing the Order of Workflow Rules

When you create a workflow rule, Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules that are based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for rules that are based on the same record type, the same trigger event, and the same parent record type. For workflow rules that have a trigger event other than Scheduled Event, the order number 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. You can change the order of your rules.

NOTE: Workflow rules that have the Scheduled Event trigger event are also assigned an order number but they are not performed in sequence. The order number is read-only for scheduled events.

For example, if you create a workflow rule based on the Account record type, with the trigger event, Before Record Is Deleted, and two workflow rules already have the same record type and trigger event, then your new rule is assigned order number 3. You can later change the order number, so that your new rule is the first rule invoked for the specified record type and trigger event.

The following procedure describes how to change the order of a workflow rule.

To change the order of workflow rules

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule whose order you want to change, and click the name link on the rule.

   For information about searching for workflow rules in the list page, see Filtering Lists.
4. On the Workflow Rule Detail page, click Edit Order.
5. In the Edit Workflow Order page, click the arrow icons to do the following:
   - Move a workflow rule up or down within the list.
   - Move a workflow rule to the top or bottom of the list of rules.
6. Click Save to save your changes.

NOTE: If you delete a workflow rule, the other rules based on the same record type and the same trigger event are automatically reordered. However, if you make a workflow rule inactive, its order within the list of rules based on the same record type and the same trigger event does not change (but the rule is not invoked).

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)

Deactivating Workflow Rules and Actions

If you deactivate a workflow rule while an instance of a Wait action on the rule is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

If you deactivate a Wait action on a workflow rule while an instance of the Wait action is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

NOTE: For information about what happens when you deactivate a scheduled event (that is, a workflow rule with the Scheduled Event trigger event), see About Scheduled Events (on page 449).

The following procedure describes how to deactivate a workflow rule.

To deactivate a workflow rule

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule that you want to deactivate.

   For information about searching for workflow rules in the List page, see Filtering Lists.
4. In the record-level menu for the rule, select Edit.
5. In the Workflow Rule Detail page, deselect the Active check box.
6. Save your changes.

The following procedure describes how to deactivate a workflow rule action.

To deactivate a workflow rule action

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule from which you want to delete the action.

   For information about searching for workflow rules in the List page, see Filtering Lists.
4. Click the Workflow Name link for the rule.
5. In the Workflow Rule Detail page, in the Actions section, find the action that you want to delete.
6. In the record-level menu for the action, select Edit.
7. In the Workflow Action Edit page, deselect the Active check box.

   NOTE: If there is an Update Values action on the rule, then the action must be preceded by at least one active Wait action on the rule, unless the trigger event for the workflow rule is Before Modified Record Saved. If you attempt to deactivate a Wait action, and if no other Wait action precedes the Update Values action, then Oracle CRM On Demand does not allow you to deactivate the Wait action.
8. Save your changes.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Changing the Order of Workflow Rules (on page 490)
- Deleting Workflow Rules and Actions (on page 492)

Deleting Workflow Rules and Actions

When you delete a workflow rule, all actions on the rule are also deleted. Also, the order numbers on the remaining rules for the relevant record type are automatically updated as necessary to ensure that there is no gap in the sequence of the numbers.

If you delete a workflow rule while one or more instances of a Wait action on the rule are in the pending state, then those pending instances are deleted from the Workflow Wait Monitor. None of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

When you delete an action from a workflow rule, the order numbers on the remaining actions on the rule are automatically updated as necessary to ensure that there is no gap in the sequence of the numbers.

If you delete a Wait action from a workflow rule while an instance of the Wait action is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

NOTE: For information about what happens when you delete a scheduled event (that is, a workflow rule with the Scheduled Event trigger event), see About Scheduled Events (on page 449).

The following procedure describes how to delete a workflow rule.

To delete a workflow rule

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule that you want to delete.

   For information about searching for workflow rules in the List page, see Filtering Lists.
4. In the record-level menu for the rule, select Delete.
5. Confirm that you want to delete the rule.

The following procedure describes how to delete a workflow rule action.

To delete a workflow rule action

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule from which you want to delete the action.

   For information about searching for workflow rules in the List page, see Filtering Lists.
4. Click the Workflow Name link for the rule.
5. In the Workflow Rule Details page, in the Actions section, find the action that you want to delete.
6. In the record-level menu for the action, select Delete.

   NOTE: If the rule has an Update Values action, then the action must be preceded by at least one active Wait action for the rule unless the trigger event for the workflow rule is Before Modified Record Saved. If you attempt to delete a Wait action, and if there is no other Wait action preceding the Update Values action, then Oracle CRM On Demand does not allow you to delete the Wait action.
7. Confirm that you want to delete the action.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 423)
- About Workflow Actions (on page 434)
- About Time-Based Workflow Rules (on page 436)
- Creating Workflow Rules (on page 446)
- Changing the Order of Workflow Rule Actions (on page 489)
- Changing the Order of Workflow Rules (on page 490)
- Deactivating Workflow Rules and Actions (on page 491)

Workflow Monitors

From the workflow monitors, you can view information about the following:

- Failed instances of workflow rules and workflow actions. For more information, see Workflow Error Monitor (on page 494).
- Pending instances of Wait actions. For more information, see Workflow Wait Monitor (on page 499).

Workflow Error Monitor

You can use the information provided in the Workflow Error Monitor to help you to understand why certain instances of a workflow rule or workflow action failed. If necessary, you can access the details of a workflow rule from the Workflow Error Monitor, so that you can correct any errors in the configuration of the workflow action. Details of the error instances are retained in the Workflow Error Monitor for 30 days or until you delete them, whichever comes first.

For information about the types of failures that are reported in the Workflow Error Monitor, see About Workflow Rule and Workflow Action Failures (on page 439).

For information about using the Workflow Error Monitor, see the following topics:

- Viewing Error Instances in the Workflow Error Monitor (on page 494)
- Deleting Error Instances from the Workflow Error Monitor (on page 496)
- Workflow Error Instance Fields (on page 496)

Viewing Error Instances in the Workflow Error Monitor

The following procedure describes how to view error instances in the Workflow Error Monitor. For information about the types of failures that are reported in the Workflow Error Monitor, see About Workflow Rule and Workflow Action Failures (on page 439).

Before you begin: To use the workflow monitors, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

To view an error instance in the Workflow Error Monitor

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Monitor.
3. On the Workflow Monitor page, click Workflow Error Monitor.
4. On the Error Instances List page, find the instance that you want.

   TIP: For information about filtering lists, see Filtering Lists.
5. To view details of an instance, click the Instance ID link.
6. To view details of the workflow rule of which a record is an instance, click the Workflow Name link for that record.

The following procedure describes how to create a filtered list of error instances.

To create a filtered list of error instances

- On the Error Instances List page, click Menu in the title bar, and select Create New List.

  For more information about creating and refining lists, see Creating and Refining Lists.

The following procedure describes how to manage filtered lists of error instances.

To manage filtered lists of error instances

- On the Error Instances List page, click Menu in the title bar, and select Manage Lists Page.

  For more information about managing lists, see Manage Lists Page.

The following procedure describes how to view the filter for a list of error instances.

To view the filter for a list of error instances

- On the Error Instances List page, click Menu in the title bar, and select Show List Filter.

  For more information about list filters, see View List Page.

For more information about using the Workflow Error Monitor, see the following topics:

- Workflow Error Monitor (on page 494)
- Deleting Error Instances from the Workflow Error Monitor (on page 496)
- Workflow Error Instance Fields (on page 496)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 422)

Deleting Error Instances from the Workflow Error Monitor

You can delete error instances from the Workflow Error Monitor one at a time. Details of the error instances are retained in the Workflow Error Monitor for 30 days or until you delete them, whichever comes first.

NOTE: The batch delete facility is not available in the Error Instances List page.

Before you begin: To use the workflow monitors, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

The following procedure describes how to delete an error instance from the Workflow Error Monitor.

To delete an error instance from the Workflow Error Monitor

1. On the Error Instances List page, find the instance that you want to delete.

   TIP: For information about filtering lists, see Filtering Lists.

2. Click the Delete link for the instance.

For more information about using the Workflow Error Monitor, see the following topics:

- About Workflow Rule and Workflow Action Failures (on page 439)
- Workflow Error Monitor (on page 494)
- Viewing Error Instances in the Workflow Error Monitor (on page 494)
- Workflow Error Instance Fields (on page 496)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 422)

Workflow Error Instance Fields

This topic provides information about the fields that you can view for failed instances of workflow rules, scheduled events, and workflow actions in the Workflow Error Monitor.

The following table describes the fields that you can view for failed instances of workflow rules and failed instances of the workflow actions on the workflow rules.

Field	Description
Instance ID	The ID that Oracle CRM On Demand generates for this workflow instance.
Workflow Name	For an instance of a failed workflow rule, the name of the rule.

Field	Description
	For an instance of a failed workflow action, the name of the workflow rule on which the action is configured. Clicking the name of the workflow rule opens the Workflow Rule Detail page, where you can view details of the rule configuration.
Workflow Action	The name of the workflow action. The record is an instance of this workflow action. If the record is an instance of a failed workflow rule, then this field is blank.
Trigger Event	The event that triggers the workflow rule.
Record Type	The record type of the record on which the instance of the workflow rule was triggered.
Record Row Id	The row ID of the record on which the instance of the workflow rule was triggered. If the workflow rule or workflow action instance failed because of a syntax error, then this field is blank.
Parent Record Type	If the record that triggered the instance of the workflow rule is the child of a parent record in the context of the action that triggered the workflow rule, then this field shows the record type of the parent record.
Parent Record Row Id	If the record that triggered the instance of the workflow rule is the child of a parent record in the context of the action that triggered the workflow rule, then this field shows the row ID of the parent record.
Error Message	The reason why this instance of the workflow rule or workflow action ended.
Initiated By	The name of the user whose action triggered the instance of the workflow rule.
Initiated On	The date and time when the instance of the workflow rule was triggered.
Terminated On	The date and time that this instance of the workflow rule or workflow action ended.
Channel Name	The name of the channel through which the instance of the workflow rule was triggered, such as Web Services, Online, Import, and so on.

The following table describes the fields that you can view for failed instances of scheduled events and failed instances of the workflow actions on the scheduled events.

Field	Description
Instance ID	The ID that Oracle CRM On Demand generates for this scheduled event or workflow action instance.
Workflow Name	For an instance of a failed scheduled event, the name of the scheduled event. For an instance of a failed workflow action, the name of the scheduled event on which the action is configured. Clicking the name of the scheduled event opens the Workflow Rule Detail page, where you can view details of the configuration of the scheduled event.
Workflow Action	The name of the workflow action. The record is an instance of this workflow action. If the record is an instance of a failed scheduled event, then this field is blank.
Trigger Event	This field always shows Scheduled Event.
Record Type	The name of the record type for which the scheduled event is configured.
Record Row Id	For an instance of a failed workflow action, the ID of the record for which the action failed. For an instance of a failed scheduled event, this field is blank.
Parent Record Type	Not applicable
Parent Record Row Id	Not applicable
Error Message	The reason why this instance of the scheduled event or workflow action failed.
Initiated By	The name of the user who made the scheduled event active.
Initiated On	The date and time when the instance of the scheduled event or workflow action was generated.
Terminated On	The date and time when the instance of the scheduled event or workflow action terminated.
Occurrence #	The number that was assigned to this instance of the scheduled event within the set of occurrences for the event.
Channel Name	Not applicable

For more information about using the Workflow Error Monitor, see the following topics:

- About Workflow Rule and Workflow Action Failures (on page 439)

- Workflow Error Monitor (on page 494)
- Viewing Error Instances in the Workflow Error Monitor (on page 494)
- Deleting Error Instances from the Workflow Error Monitor (on page 496)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 422)

Workflow Wait Monitor

From the Workflow Wait Monitor, you can view the details of the following:

- Pending instances of Wait actions and details of those workflow actions.
- Pending instances of scheduled events, that is, workflow rules with the Scheduled Event trigger event.

For example, if an instance of a workflow Wait action or an instance of a scheduled event is pending for longer than you expect, then you can use the Workflow Wait Monitor to investigate the instance and look at the configuration of the workflow rule, scheduled event, or workflow action. If necessary, you can delete the instance.

NOTE: When you delete a pending instance of a Wait action, none of the remaining actions on the workflow rule are performed. When you delete a pending instance of a scheduled event, the instance of the event is cancelled, the status of the scheduled event is set to Terminated, and the scheduled event is deactivated. No further instances are generated for the remaining occurrences of the scheduled event.

Pending Instances of Wait Actions

To understand how pending instances of Wait actions are processed on a workflow rule, consider the following example. You might configure a workflow rule with the following intended sequence of actions:

1. A Wait action with a duration of 24 hours
2. A Send Email action
3. A Wait action with a duration of 48 hours
4. A Send Email action
5. A Create Task action

If the actions are correctly configured, then the first Wait action in the sequence, action 1, remains in the Pending state for at least 24 hours. After the wait period ends, the Send Email action (action 2) is performed. The second Wait action (action 3 on the workflow rule) is next in the sequence. It remains in the Pending state for at least 48 hours. After the wait period ends, the Send Email action (action 4) and the Create Task action (action 5) are performed.

NOTE: The wait period specifies the minimum amount of time that must pass before Oracle CRM On Demand starts to execute the other actions on the workflow rule. The actual amount of time that passes before the

other actions are executed might be longer, depending on the load on the Oracle CRM On Demand database and the Oracle CRM On Demand server, and also on the number of Wait actions that are pending when the wait period ends.

However, if the wait period on action 3 was incorrectly specified as 48 days rather than 48 hours, then the action remains in the Pending state until 48 days have passed. You can see the action in the Workflow Wait Monitor, and you can view the action details to see whether the wait period is incorrectly specified. You can then delete the Wait action instance.

When you delete the Wait action instance, the workflow rule instance is terminated, and the remaining actions on the rule instance are not performed. In the previous example, the following occurs:

- If you delete action 1 while it is pending, then actions 2, 3, 4, and 5 are not performed.
- If you delete action 3 while it is pending, then actions 4 and 5 are not performed.

NOTE: Wait actions are the only type of workflow actions that are held in the Pending state.

Pending Instances of Scheduled Events

A pending instance of a scheduled event remains in the Pending state until the date and time when the instance is scheduled to be executed (the resume date). The resume date is the earliest possible time that the instance will be executed. Depending on the load on the Oracle CRM On Demand database and on the Oracle CRM On Demand server at that time, the instance might not be executed immediately.

NOTE: After an instance of a scheduled event starts to execute, the instance is no longer shown in the Workflow Wait Monitor and you cannot delete the instance. If you want to terminate an instance that is currently being executed, then you must deactivate the scheduled event. For information about what happens when you deactivate a scheduled event, see About Scheduled Events (on page 449).

Related Topics

For information about scheduled events, see the following topics:

- About Scheduled Events (on page 449)
- Creating Scheduled Events (on page 451)

For information about using the Workflow Wait Monitor, see the following topics:

- Viewing Pending Instances in the Workflow Wait Monitor (on page 500)
- Deleting Pending Instances from the Workflow Wait Monitor (on page 502)
- Workflow Pending Instance Fields (on page 503)

Viewing Pending Instances in the Workflow Wait Monitor

The following procedure describes how to view pending instances in the Workflow Wait Monitor. For information about what is recorded and displayed in the Workflow Wait Monitor, see Workflow Wait Monitor (on page 499) and Workflow Pending Instance Fields (on page 503).

Before you begin: To use the workflow monitors, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

To view a pending instance in the Workflow Wait Monitor

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Monitor.
3. On the Workflow Monitor page, click Workflow Wait Monitor.
4. On the Pending Instances List page, find the instance that you want.

   TIP: For information about filtering lists, see Filtering Lists.
5. To view details of an instance, click the Instance ID link.
6. To view details of the workflow action or scheduled event of which the record is an instance, click the Workflow Name link.

The following procedure describes how to create a filtered list of pending instances.

To create a filtered list of pending instances

- On the Pending Instances List page, click Menu in the title bar, and select Create New List.

  For more information about creating and refining lists, see Creating and Refining Lists.

The following procedure describes how to manage filtered lists of pending instances.

To manage lists of pending instances

- On the Pending Instances List page, click Menu in the title bar, and select Manage Lists Page.

  For more information about managing lists, see Manage Lists Page.

The following procedure describes how to view the filter for a list of pending instances.

To view the filter for a list of pending instances

- On the Pending Instances List page, click Menu in the title bar, and select Show List Filter.

  For more information about list filters, see View List Page.

For more information about using the Workflow Wait Monitor, see the following topics:

- Workflow Wait Monitor (on page 499)
- Deleting Pending Instances from the Workflow Wait Monitor (on page 502)
- Workflow Pending Instance Fields (on page 503)

Related Topics

See the following topic for related information about workflow rules and scheduled events:

- Workflow Configuration (on page 422)

Deleting Pending Instances from the Workflow Wait Monitor

You can delete pending instances from the Workflow Wait Monitor one at a time. You can also delete multiple pending instances at the same time, by creating a filtered list of the instances and using the batch delete facility. For information about what is recorded and displayed on the Workflow Wait Monitor, see Workflow Wait Monitor (on page 499) and Workflow Pending Instance Fields (on page 503).

The following considerations apply to deleting pending instances:

- When you delete a pending instance of a Wait action from the Workflow Wait Monitor, the workflow rule instance is ended, and none of the remaining actions on the workflow rule are performed.
- When you delete a pending instance of a scheduled event, the instance of the event is cancelled, the status of the scheduled event is set to Terminated, and the scheduled event is deactivated. No further instances are generated for the remaining occurrences of the scheduled event.

  If you want further instances of the scheduled event to be generated, then you must make the scheduled event active again. For information about updating scheduled events, see Creating Scheduled Events (on page 451).
- After you delete a pending instance of a Wait action or a pending instance of a scheduled event, you cannot restore it.

Before you begin: To use the workflow monitors, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

The following procedure describes how to delete a pending instance from the Workflow Wait Monitor.

To delete a pending instance from the Workflow Wait Monitor

1. On the Pending Instances List page, find the instance that you want to delete.

   TIP: For information about filtering lists, see Filtering Lists.

2. Click the Delete link for the instance.

The following procedure describes how to delete a list of pending instances from the Workflow Wait Monitor.

To delete a list of pending instances from the Workflow Wait Monitor

1. If you have not already done so, create the list of instances that you want to delete.

   For more information about creating and refining lists, see Creating and Refining Lists.

2. On the Pending Instances List page, click Menu, and select Batch Delete.
3. Click OK to confirm that you want to proceed.
4. On the Batch Delete and Restore Queue page, in the Active Requests section, click Proceed.

   NOTE: If you do not click Proceed, then the records are not deleted.

   TIP: You can return to the Batch Delete and Restore Queue page at any time by clicking the Admin global link, and then clicking Batch Delete and Restore Queue on the Admin Homepage.

5 To review the log file for the delete operation, on the Batch Delete and Restore Queue page, in the Processed Requests section, click View Delete Log.

For more information about using the Workflow Wait Monitor, see the following topics:

- Workflow Wait Monitor (on page 499)
- Viewing Pending Instances in the Workflow Wait Monitor (on page 500)
- Workflow Pending Instance Fields (on page 503)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 422)

Workflow Pending Instance Fields

The following table describes the fields that you can view for pending instances of Wait actions and scheduled events.

Field	Description for Instances of Workflow Wait Actions	Description for Instances of Scheduled Events
Instance ID	The ID that Oracle CRM On Demand generates for this workflow instance.	The ID that Oracle CRM On Demand generates for this scheduled event instance.
Workflow Name	The name of the workflow rule on which the workflow action is configured. Clicking the name of the workflow rule opens the Workflow Rule Detail page, where you can view details of the workflow rule configuration.	The name of the scheduled event of which this is an instance.
Workflow Action	The name of the workflow action. The instance is an instance of this workflow action.	Not applicable
Trigger Event	The event that triggers the workflow rule.	This field always shows Scheduled Event.
Initiated By	The name of the user whose action triggered the instance of the workflow rule.	The name of the user who made the scheduled event active.
Initiated On	The date and time when the instance of the workflow rule was triggered.	The date and time when the pending instance was generated.
Resumes On	The date and time when the wait period for this instance of the workflow action will end.	The date and time after which the pending instance will be executed.

Field	Description for Instances of Workflow Wait Actions	Description for Instances of Scheduled Events
Occurrence #	Not applicable	The number of instances of the scheduled event that have been triggered. The count includes the current pending instance. **NOTE:** If a scheduled event is deactivated and later made active again, then the number of occurrences is reset to 1 on the first instance that is generated after the rule is made active.
Record Type	The record type of the record on which the instance of the workflow rule was triggered.	The record type for which the scheduled event is configured.
Record Row Id	The row ID of the record on which the instance of the workflow rule was triggered.	Not applicable
Parent Record Type	If the record that triggered the instance of the workflow rule is the child of a parent record in the context of the action that triggered the workflow rule, then this field shows the record type of the parent record.	Not applicable
Parent Record Row Id	If the record that triggered the instance of the workflow rule is the child of a parent record in the context of the action that triggered the workflow rule, then this field shows the row ID of the parent record.	Not applicable

For more information about using the Workflow Wait Monitor, see the following topics:

- Workflow Wait Monitor (on page 499)
- Viewing Pending Instances in the Workflow Wait Monitor (on page 500)
- Deleting Pending Instances from the Workflow Wait Monitor (on page 502)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 422)

Data Rules and Assignment

Click a topic to see step-by-step instructions for procedures for setting up assignment rules (to assign records automatically), forecast definitions, lead conversion layouts and mappings, sales methodologies, and industries:

- Setting Up Assignment Rules (on page 509)
- Mapping Additional Fields During Lead Conversion (on page 516)
- Creating Lead Conversion Layouts (on page 518)
- Setting Up the Forecast Definition (on page 521)
- Updating the Forecast Definition (on page 527)
- Setting Up Sales Processes, Categories, and Coaches (see "Setting Up Sales Processes, Categories and Coaches" on page 528)
- Customising Your Company's Industry List (on page 536)

Related Topics

See the following topics for related information:

- About Assignment Rules (on page 505)
- Lead Conversion Administration (on page 515)

About Assignment Rules

Before you begin. To set up the assignment rules, your role must include the Data Rules and Assignment privilege.

Assignment rules allow you to automatically assign a lead, an opportunity, a service request or an account to the appropriate person, team and territory, based on the rules (called rule groups) that you set up.

If your company has selected the group assignment option, all group members share the records you assign to a member of that group. For more information, see Group Management (on page 383).

Depending on your company's structure and business processes, assignment rules can be simple. For example:

- Sales leads for each geographic region are assigned to the regional sales manager.
- New service requests are assigned to the technical service manager.

Or, the rules can be more complex. For example:

- Most leads are assigned by product expertise and geographic location, but some are assigned to a telemarketing manager.
- Most service requests are assigned by problem area, but all requests involving a particular product are routed to one person.

The following table describes how you can assign record types:

This record type	Has the following assignment options
Accounts	You can assign the records to an employee or territory. In addition, you can specify teams that share ownership of the newly assigned accounts.
Leads	You can assign the records to an employee.
Opportunities	You can assign the records to an employee or a territory. In addition, you can specify teams that share ownership of the newly assigned opportunities.
Service Requests	You can assign the records to an employee.

The assignment rules in the active rule group are evaluated when the following occurs in relation to a record type:

- For leads: The Reassign Owner check box is selected and the change is saved.
- For service requests:
  - The service request is created without an owner or the owner is deleted from the record (that is, the Owner field is blank).
  - The Reassign Owner check box is selected and the change is saved.
- For accounts: The Reassign Owner check box is selected and the change is saved.
- For opportunities: The Reassign Owner check box is selected and the change is saved.

NOTE: The assignment manager attempts to reassign a record immediately after the Reassign Owner check box is selected on the record and the record is saved. However, when a lead record is being converted to an account or opportunity, any attempt to reassign the account or opportunity fails because the assignment manager cannot reassign the record until the lead is fully converted. For example, using a workflow rule to select the Reassign Owner check box, or setting a default value on the account or opportunity when the lead is being converted, does not result in the record being reassigned. You must instead reassign the record manually by selecting the Reassign Owner check box on the converted record after the record is fully converted.

Email Notifications

When a lead or service request is assigned an owner, an email is sent to the new owner. The template that is used for the email is determined by the language that is selected in the Personal Detail page of the new owner. For example, if the user wants to receive the notification emails in Spanish, then Spanish must be selected in the Language field on the user's Personal Detail page. You can turn off email notification for service requests on a rule basis by deselecting the Send Email Notification check box (flag) on the Service Request Assignment Rule Edit page. For information about updating assignment rules, see Setting Up Assignment Rules (on page 509).

In the email notifications, the From address is always donotreply@crmondemand.com and the Sender field is set to the address that you specify in the Return E-mail field on the assignment rule group. Oracle CRM On Demand appends a string to each email so that the email can be tracked in the email delivery system at Oracle. If an email recipient responds to an email notification, then the To field in the reply is set to the address that you specify in the Return E-mail field on the assignment rule group.

Tracking the Reassignment Process

You can use three fields to help you to track the owner reassignment process, or to run analyses to determine how long the reassignment process takes. You can add these fields to Account, Opportunity, Lead, and Service Request page layouts. The fields are:

- Assignment Status

  The status can be Queued (the record is in the queue to be processed by assignment manager), or Processing (the record is currently being processed by assignment manager), or blank (the record is neither in the queue or being processed).

- Last Assignment Submission Date

  If the record is queued for processing or is currently being processed by assignment manager, this field shows the date and time the record was saved with the Reassign Owner check box selected. However, in the case of a service request record, this field shows the date and time the record was saved with the Owner field blank.

- Last Assignment Completion Date

  If a record has never been reassigned, this field is blank; otherwise, the field shows the date and time the record was last reassigned.

For more information on adding fields to page layouts, see Customising Static Page Layouts (on page 165).

Making Rule Groups Active

You can create multiple assignment rule groups, but only one rule group can be active at a time for each record type.

CAUTION: The rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you create a new rule group, and mark it active, do not delete the previously active rule group until after the rules have been released.

TIP: Rule groups can serve as historical reference for the leads. Instead of deleting rule groups, you can mark them as inactive.

About Group Assignment

If your company assigns records to entire groups instead of one employee, your company administrator must:

1. Select the Default Group Assignment field in the Company Profile page (see Setting Up Your Company Profile and Global Defaults (on page 19)).

2. Set up the groups before activating the assignment rules (see Setting Up Groups (on page 386)).

3. Select one member in the group to be the owner for accounts or opportunities during the assignment procedure.

   NOTE: The group functionality is not supported for lead or service request records.

When the record is assigned to an owner in the group:

- The Owner field shows the owner's information.

- The Primary Group field shows the group name that the owner belongs to on the record Edit and Detail pages, if the company administrator added the field to the layout.
- The record appears in the areas of the applications that normally display that employee's records, such as Homepages and record lists.

Generally, all members in the group have full access to the record, although access levels can be adjusted to restrict a user's access.

About Assignment Manager and Record Ownership Modes

The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. If there is a primary custom book assigned to the record before the assignment manager reassigns the record to an owner, then the assignment manager removes the primary book from the record. The assignment manager cannot reassign records if the record type is configured in book mode. If you configure a record type in book mode, then it is strongly recommended that you make all rule groups for that record type inactive. For more information about record ownership modes, see About Record Ownership Modes (on page 346).

Scenario for Assigning Leads

The following is an example of a typical company's business rules for assigning leads. To set up the rules that automatically assign this company's leads, the administrator does the following:

1. States the company's business rules for assigning leads to people.

   For example, for accounts in the U.S., many sales territories are assigned by state, but in certain states, the product expertise determines the territory assignments. In addition, Corporation XYZ account is always assigned to one particular sales manager regardless of the lead's state or product interest.

2. Lists all of the assignment scenarios that are necessary to cover the business rules:
   - **Account (company) is Corporation XYZ.** Assign to Sales Manager A.
   - **Primary Address - State is CA, NV, OR, WA.** Assign to Sales Manager B.
   - **Primary Address - State is OH, IN, MI, NY, KY.** Assign to Sales Manager C.
   - **Lead is interested in the ABC Product (in all states except those listed already, and not for Corporation XYZ).** Assign to Sales Manager D.
   - **Primary Address - State is not listed.** Assign to Sales Manager E.

3. Puts the scenarios in the order in which they are to be considered.

   First, examine the Account field. If the value is Corporation XYZ, assign the lead to Sales Manager A, regardless of any other conditions. If this criterion is not matched, examine the Primary Address State field. If the value is CA, NV, OR, or WA, assign the lead to Sales Manager B, and so on.

As a best practise, use the Record Assignment Template to help you plan your company's assignment scenarios, and to set up rules that give you the results you want.

Criteria Conditions in Assignment Rules

You can use the following conditions in the criteria on assignment rules:

- **Between.** Matches the rule to records where the value in the criterion field is between two values defined on the rule criterion. (The results do not include records where the value in the criterion field is equal to one of the values on the rule.) Use a comma to separate the values. Do not use a dash (-) to specify a value range or to separate values.

  Use the Between condition for date fields only. Use the MM/DD/YYYY date format.

- **Contains all values.** Matches the rule to records where the value in the criterion field matches the exact values. The application does not retrieve substrings of the values, or the same value with different capitalization. You can enter a single value or multiple values separated by commas.

- **Contains exact field value.** Matches the rule to records where the criterion field contains all of the string in the criterion field value, and no additional characters. For example, if you enter *Closed* as the criterion value, the rule is matched to records where the criterion field value is Closed, but not records where the criterion value is Closed/won.

  You cannot use the Contains exact field value condition for date fields or number fields.

- **Contains none of the values.** Matches the rule to records where the criterion field contains any values that are not equal to the rule criterion value.

  You cannot use the Contains none of the values condition for date fields or number fields.

- **Less than or equal to.** Matches the rule to records where the value in the criterion field is less than or equal to the rule criterion value.

  You can use the Less than or equal to condition for number fields and currency fields only.

- **Greater than or equal to.** Matches the rule to records where the value in the criterion field is greater than or equal to the rule criterion value.

  You can use the Greater than or equal to condition for number fields and currency fields only.

Note the following points regarding rule criteria:

- A rule without criteria always succeeds.
- Rules are evaluated in sequential order, and evaluation stops when the criteria on a rule are met.

For example, if ten rules are being evaluated and the criteria on rule 6 are met, then rules 7, 8, 9, and 10 are ignored (that is, they are not evaluated). Similarly, if there are no criteria on rule 6, rule 6 succeeds, and rules 7, 8, 9, and 10 are ignored.

For step-by-step instructions on how to set up assignment rules, see Setting Up Assignment Rules (on page 509).

Setting Up Assignment Rules

Before you begin:

- To set up the assignment rules, your role must include the Data Rules and Assignment privilege.
- For information about designing your assignment rules, see About Assignment Rules (on page 505).

Assignment Rule Group Example

Rule groups are made up of rules, which, in turn, are made up of criteria. The following figure shows the components of a rule group.

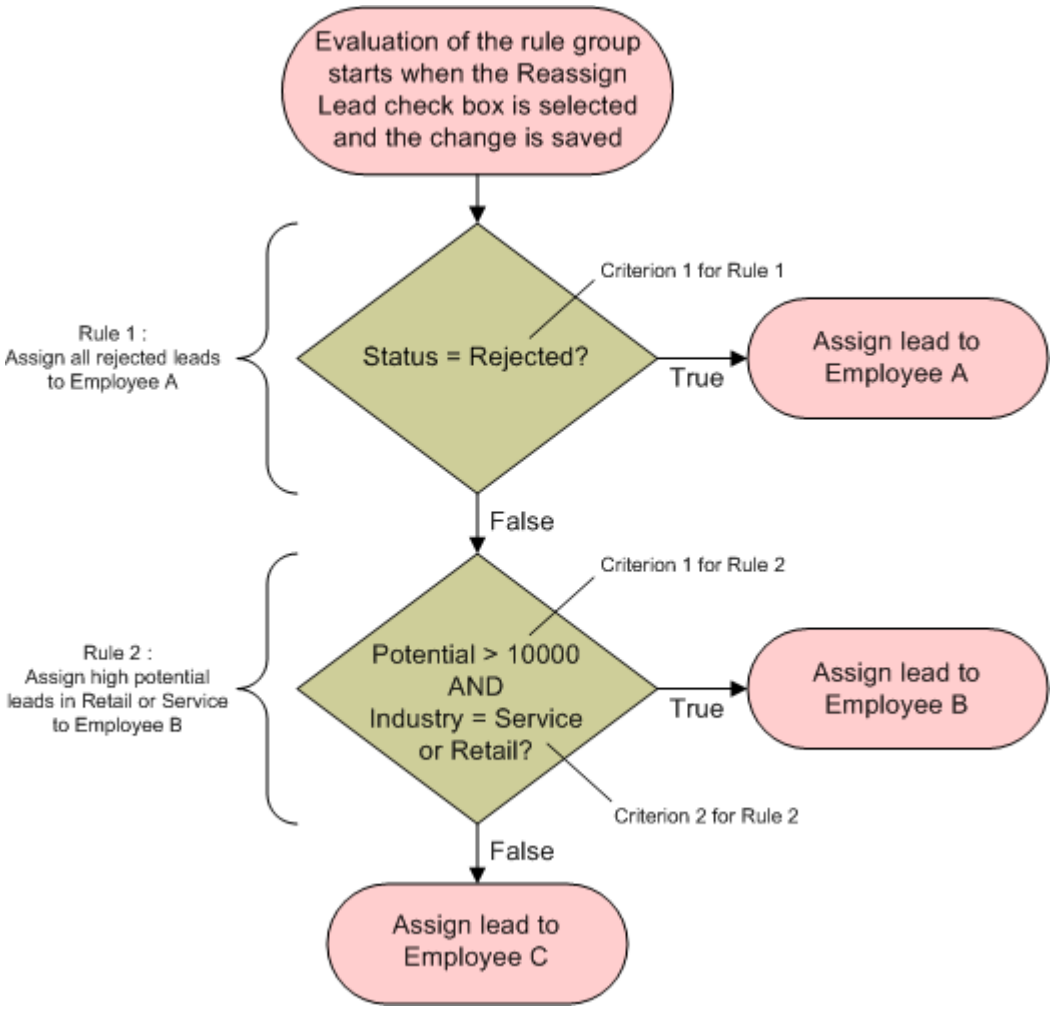


Figure 1: How a Lead Assignment Rule Group Is Evaluated

NOTE: For the Reject button on the Lead Detail page to behave correctly, the first rule in the rule group must assign rejected leads.

To set up assignment rules

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

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Assignment Rules section, click the link for the appropriate record type.

A list of all of the rule groups that have been defined for your company to date appears.

4 Create a new rule group:

a Click the New Rule Group button.

b On the New/Edit page, fill in the fields.

Field	Description
Rule Group Name	A unique name, up to 30 characters.
Active Rule Group	Only one rule group can be active at a time. If you specify a new rule group as active, the previously activated rule group becomes inactive.
Unassigned Owner	An employee who inherits the records that are not assigned by one of the rules. **Example:** Employee C in Figure 1.
Return E-mail	This field appears for lead and service request rule groups only. The email address that you specify in the Return E-mail field on the assignment rule group appears in the Sender field in the email notifications that are sent to the owners of leads and service requests. Also, if an email recipient responds to an email notification, then the To field in the reply is set to the address that you specify in the Return E-mail field. **NOTE:** No email notifications are sent for account and opportunity records.
Unassigned Account Territory	A territory that inherits the records that are not assigned by one of the rules. This field appears for account rule groups only.
Unassigned Opportunity Territory	A territory that inherits the records that are not assigned by one of the rules. This field appears for opportunity rule groups only.

c Save the record.

This saves the name of the new rule group in preparation for adding rules to the rule group.

5 Add a rule to the rule group:

a In the Rules title bar on the Rule Group Detail page, click New.

b On the New/Edit page, fill in the fields.

The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Rule Name	A unique name.	Assign high potential leads in Retail or Service
Order	The order in which the rules are evaluated. When the criteria on one rule are met, the record is assigned and subsequent rules are ignored.	1
Assign To Owner	If the rule criteria are met, the record is assigned to this user. For group assignment of accounts and opportunities, the user must be a member of the group sharing the records.	Employee B
Assign To Territory	If the rule criteria are met, the record is assigned to this territory. This field appears for account and opportunity rules only.	North Eastern Region
Include Related Contacts	If the rule criteria are met, the contacts linked to the account are assigned to the specified account owner and territory. This field appears for account rules only.	Not applicable
Include Related Opportunities	If the rule criteria are met, the opportunities linked to the account are assigned to the specified account owner and territory. This field appears for account rules only.	Not applicable
Include Team Assignment	If the rule criteria are met, the team members are assigned to the account. This field appears for account and opportunity rules only.	Not applicable

c Save the record.

This saves the rule so you are now ready to add criteria to the rule.

6 (Optional) For accounts and opportunities, update the access for linked records and users:

a On the Rule Group Detail page, click the Name link of the rule where you want to update the access for linked records and users.

b On the Rule Detail page, click Add Users or Edit Users on the Team Assignment title bar.

c Click the Lookup icon and select the users.

d Assign the access level for accounts, contacts and opportunities.

e Save your changes.

7 Add a rule criterion to the rule:

a In the Rule Criteria title bar on the Rule Detail page, click New.

b On the New/Edit page, fill in the fields.

The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Field	Name of the field to be evaluated. **NOTE:** If a field has been relabelled, the new field name appears.	Potential Revenue
Condition	The following conditions cannot be used for date fields or number fields: Contains all values, Contains exact field value and Contains none of the values. The following conditions can be used for number fields and currency fields only: Greater than or equal to, Less than or equal to. The Between operator can be used for date fields only.	Greater than or equal to
Value(s)	Use commas to separate values. If the value you want to match includes a comma, such as an address, enclose the value in quotation marks. If the condition is Between, enter the minimum and maximum values separated by commas.	10000

c Perform one of the following:

- If you want to add more criteria to the rule, click Save and New Rule Criteria and go back to Step b. If you have multiple criteria defined for a rule, the record must match *all of the criteria* in order for the rule to be matched.
- If you have entered all criteria for the rule, click Save.

8 In the Rule title bar on the Rule Detail page, click Back to Rule Group Detail.

9 On the Rule Group Detail page, perform one of the following:

- If you want to add more rules to the rule group, go back to Step 5.

- If you have entered all the rules for the rule group, click Back to Rule Group List to finish.

TIP: Rules are executed in the order in which they appear in the Rule Group, so make sure they appear in the correct sequence. After one rule is met, subsequent rules are ignored.

To edit, activate or inactivate a rule group

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules & Assignment link.
3. In the Assignment Rules section, click the link for the type of assignment rules that you want to edit.

   A list of all the rule groups of that type that have been defined for your company to date appears.
4. Click the Rule Group link that you want to update.
5. On the Rule Group Detail page, click Edit.
6. Update the fields and save the record.

   The changes that you make take effect at midnight Oracle Server time (default), or whenever your assignment rule groups have been set to update.

   CAUTION: When you mark a rule group *active,* the rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you mark a rule group *active,* do not delete the previously active rule group until after the rules have been released.

To edit assignment rules

1. On the Rule Group Detail page, click the Edit link of the rule that you want to change.
2. Update the fields.

   NOTE: You can change the order in which rules are evaluated by editing the Order field. On the rule that you want to change, enter an order number that is higher than the order number of the rule that is to precede the rule you are changing, and lower than the order number of the rule that is to follow it.

   For example, if there are three rules, ordered 1 to 3, and you want to change the order so that the rule that is currently number 1 is evaluated after the rule that is currently number 2, change the order of rule number 1 to a value, such as 2.1 (or any value greater than 2 and less than 3).
3. Save the record.

Lead Conversion Administration

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records.

When users convert a lead record, they can perform one of the following:

- Create new account, contact, opportunity, or deal registration records, which are linked automatically to the lead record.
- Link the lead record to existing account and contact records. Users select the records that they want to link to the lead when they convert the lead.

If you make the necessary options available in the lead conversion layouts, then users can also do the following:

- Copy the members of the lead team to the team on the account, contact, and opportunity that are created or linked to the lead during the conversion process.
- Link the lead's associated custom object records to the account, contact, and opportunity that are created or linked to the lead during the conversion process.

You can determine which options are available to users on the Convert Lead page by creating lead conversion layouts for the page, and assigning these layouts to user roles.

In the standard application, some information from the lead record is carried over to the relevant fields in the account, contact, opportunity, and deal registration records that are created or linked to the lead during the conversion process. You can determine what information is carried over by configuring the following:

- The mappings between the fields on the Lead record type and the Account, Contact, Deal Registration, and Opportunity record types. For more information, see Mapping Additional Fields During Lead Conversion (on page 516).
- The fields from the lead record that appear in the Opportunity and Deal Registration sections of the Convert Lead page. Users can edit the values of these fields on the Convert Lead page. These values are then carried over to the new opportunity or deal registration. For information about configuring which fields appear on the Convert Lead page, see Creating Lead Conversion Layouts (on page 518).

  NOTE: Only the fields that are mapped to fields in the relevant record type are available to be added to the Convert Lead page layout. If a field that you want to add to the Convert Lead page is not already mapped to fields on the relevant record type, then you must map it before you can add it to the layout of the Convert Leads page. In addition, concatenated fields and fields of the Web Link field type are not available to be added to a lead conversion layout, even if such fields are mapped to fields on the relevant record type. The Associated Opportunity field and the Next Step field always appear in the Opportunity section of the Convert Lead page, and the Deal Registration Name field and the Principal Partner Account field always appear in the Deal Registration section. You cannot remove these fields from the page layout.

To convert leads, users must have the appropriate access to record types and the appropriate privileges in their role. For more information, see Access Profile and Role Settings for Converting Leads.

When users reject a lead, they must select a rejection code in the Reject Code field in the Reject a Lead page. A number of values are provided by default for the Reject Code field, but you can change these values or add more values to the list. For more information about the Reject Code picklist, see Reject Code for Leads (on page 520).

Related Topics

For more information about lead conversion administration, see the following topics:

- Process of Setting Up Lead Conversion (on page 516)
- Mapping Additional Fields During Lead Conversion (on page 516)
- Creating Lead Conversion Layouts (on page 518)

Process of Setting Up Lead Conversion

To set up lead conversion and rejection settings for your users and record types, perform the following tasks:

1. If you want to map additional fields during lead conversion, set up the new mappings.

   For more information on mapping fields, see Mapping Additional Fields During Lead Conversion (on page 516).

2. If you want to customise the layout of the Convert Lead page:

   a. Create the new layouts.

      For more information on creating layouts, see Creating Lead Conversion Layouts (on page 518).

   b. Add the new layouts to the appropriate roles.

      For more information on adding roles, see Adding Roles (on page 309).

3. Make sure that the users have the appropriate access to record types and the appropriate privileges in their role.

   For more information about the settings that are required for converting leads, see Access Profile and Role Settings for Converting Leads.

4. If you want to edit the values in the Reject Code picklist, edit the field values.

   For more information on editing field values, see Creating and Editing Fields (on page 125). For more information about the Reject Code picklist, see Reject Code for Leads (on page 520).

Mapping Additional Fields During Lead Conversion

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records.

When users convert leads to account, contact, opportunity, or deal registration records, some values are carried over to the new records by default. However, you can extend the amount of information that is carried over by mapping additional fields, including custom fields. For an example of how lead fields can be mapped, see Leads.

When users convert a lead record, the values in the mapped fields are carried over as follows:

- When users create new account, contact, opportunity, or deal registration records, the values from the mapped fields on the lead record are carried over to the specified fields in the new record.

- When users link the lead record to existing account, contact, opportunity, or deal registration records that they select when converting the lead, the fields in the existing records that already have values remain unchanged. Fields that are empty are updated with the value from the mapped lead field.

NOTE: A partner user cannot approve a deal registration or assign an approver to a deal registration. Therefore, when a partner user tries to convert a lead to a deal registration, the conversion fails if the conversion process tries to update the Current Approver field or the Final Approver field on the deal registration record. If your company allows partner users to convert leads to deal registrations, then do not map any field on the Lead record type to the Current Approver field or the Final Approver field in the Deal Registration record type.

About Web Link Fields

Do not map Web link fields for lead conversion. Web link fields do not contain data, instead, they contain scripts for links that users can click to perform actions. The contents of Web link fields cannot be carried over to the new records when a lead is converted.

About Concatenated Fields

Do not map concatenated fields for lead conversion. A *concatenated field* is a field that can display the values from multiple fields and can also display text. The contents of a concatenated field cannot be carried over to the new records when a lead is converted. If you want to carry over the values from the fields that appear within a concatenated field to the new records when a lead is converted, then map the individual fields for lead conversion.

About Customised Picklist Fields and Values

You can map picklist fields from the lead record to text fields (long or short) on account, contact, opportunity, and deal registration records, or to a picklist field with identical values.

Before you begin. To perform the following procedure your role must include the Data Rules and Assignment privilege.

To map additional fields when converting a lead record

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Data Rules & Assignment.
3. In the Lead Conversion Administration section, click Lead Conversion Mapping.
4. On the Lead Conversion Mapping page, select the fields to be mapped.
5. To revert the mapping back to the default settings, click the Default button on the title bar.
6. Click Save.

Creating Lead Conversion Layouts

You can specify what options are available to users when they convert leads, by creating customised layouts for the Convert Lead page, and then assigning the layouts to user roles.

NOTE: To convert leads to accounts, contacts, opportunities, or deal registrations, users must also have the appropriate settings in their access profiles and role. For more information about the settings that are required for converting leads, see Access Profile and Role Settings for Converting Leads.

The following table shows the options that you can make available on the Convert Lead page.

Record Type	Options
Account	Do Not Convert to Account Use Existing Account Auto-create New Account Copy Lead Team to Account Associate Custom Object *n*, where *n* is a number between 01 and 40
Contact	Use Existing Contact Auto-create New Contact Copy Lead Team to Contact Associate Custom Object *n*, where *n* is a number between 01 and 40
Opportunity	Do Not Convert to Opportunity Auto-Create New Opportunity Copy Lead Team to Opportunity Associate Custom Object *n*, where *n* is a number between 01 and 40
Deal Registration	Do Not Create Deal Registration Auto-Create Deal Registration **NOTE:** The Deal Registration options are applicable only if your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition.

A standard layout is provided. The standard layout includes some of the options for accounts, contacts and opportunities, but it does not include any of the options for deal registrations. You can copy the standard layout and then edit the copy, but you cannot edit or delete the standard layout.

Depending on the options you make available for a record type, the record type sections on the Convert Lead page are affected as follows:

- If you do not make any of the options available for a record type, the Convert Lead page does not include a section for that record type.

- If you make only the Do Not Convert to Account option available for the Account record type, the Accounts section does not appear on the page.
- If you make only the Do Not Convert to Opportunity option available for the Opportunity record type, the Opportunity section does not appear on the page.
- (Applicable in Oracle CRM On Demand Partner Relationship Management Edition only) If you make only the Do Not Create Deal Registration option available for the Deal Registration record type, the Deal Registration section does not appear on the page.

Before you begin. To perform the procedure described in this section, your role must include the Data Rules and Assignment privilege.

To create a lead conversion layout

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Data Rules & Assignment.
3. In the Lead Conversion Administration section, click Lead Conversion Layout.
4. In the Lead Conversion Layout List page, click New Layout.
5. In Step 1, Layout Name:
   a. Enter the name for the layout.
   b. (Optional) Enter a description for the layout.
   c. If you want this layout to be the default for all users, select the Default Lead Conversion Layout check box.

      NOTE: By default, the Standard Lead Conversion Layout provided in Oracle CRM On Demand acts as the default lead conversion layout for the company unless another layout is marked as the default. If you create another layout, and select the Default Layout check box for the new layout, the Standard Lead Conversion Layout will no longer be the default. So, the Standard Lead Conversion Layout is the default layout for the company only when the Default Layout check box is deselected for any other layout. However, the Default Layout check box for the Standard Lead Conversion Layout always remains deselected, even when it is acting as the default.
6. In Step 2, Select Actions, highlight the record type for which you want to select the actions (Account, Contact, Opportunity, or Deal Registration) in the Lead Conversion Record Type section, and then click the arrows to move the actions you want to display on the page from the Lead Conversion Available Actions section to the Lead Conversion Selected Actions section. Repeat this step for each of the record types.
7. In Step 3, Select Fields, specify the lead fields that you want to carry over to the Opportunity and Deal Registration sections of the Convert Lead page when the user clicks Convert on the Lead Detail page, as follows:
   a. In the Lead Conversion Record Types list, select the record type for which you want to configure the fields for the Convert Lead page (Opportunity or Deal Registration).

The Lead Conversion Selected Fields list initially shows the fields that are carried over by default. The Lead Conversion Available Fields list shows all of the additional fields that are available to be carried over to the Convert Lead page for that record type.

NOTE: Only the fields that are mapped to fields in the relevant record type are available to be added to the Convert Lead page layout. If a field that you want to add to the Convert Lead page is not already mapped to fields on the relevant record type, then you must map it before you can add it to the layout of the Convert Leads page. In addition, concatenated fields and fields of the Web Link field type are not available to be added to a lead conversion layout, even if such fields are mapped to fields on the relevant record type. The Associated Opportunity field and the Next Step field always appear in the Opportunity section of the Convert Lead page, and the Deal Registration Name field and the Principal Partner Account field always appear in the Deal Registration section. You cannot remove these fields from the page layout. For more information, see Mapping Additional Fields During Lead Conversion (on page 516).

b. Move the fields that you want to the Lead Conversion Selected Fields list, and move any fields that you do not want to the Lead Conversion Available Fields list. The maximum number of fields that can be included in the Lead Conversion Selected Fields list for a record type is nine.

c. Repeat steps a and b for the other record type (Opportunity or Deal Registration).

8. In Step 4, Confirm, review your selections, and if necessary, return to Step 2, Select Actions, or Step 3, Select Fields, to change your selections.

9. Click Finish to save your changes.

Reject Code for Leads

When users reject a lead, they must select a rejection code in the Reject Code field in the Reject a Lead page. Users can also enter a text description of the reason for the rejection in the Reject Reason field. If a user selects the *Other* value in the Reject Code field, the Reject Reason field becomes a required field, and the user must enter a description of why the lead was rejected. Otherwise, the Reject Reason field is optional.

A number of values are provided by default for the Reject Code field, but you can change these values, or add more values to the list. The default values are:

- 3rd Party Contact
- Do Not Contact Again
- Duplicate
- Failed to Reach Contact
- Inappropriate Contact
- Insufficient Data
- Invalid Phone Number
- No Business Opportunity
- Opportunity in Progress
- Other

- Recently Contacted (<30 days)
- Data Entry/System Error
- Already Owns Product
- Targeting Criteria Not Met

For information about editing picklist values, see Changing Picklist Values (on page 158).

NOTE: If you rename the *Other* value, the Reject Reason field still becomes a required field when the user selects the renamed value in the Reject a Lead page.

About Restricting Reject Code Values

The Status field is displayed in the Reject a Lead page. It is read-only and is set to Rejected. You can restrict the values that are available for users to select in the Reject Code field in the Reject a Lead page by defining a cascading picklist that has the Status field as the parent picklist and the Reject Code field as the related picklist. For information about defining cascading picklists, see Defining Cascading Picklists (on page 193). You can also disable reject code values, see Changing Picklist Values (on page 158).

NOTE: You can use only the Status field as a parent pickilst to restrict the values in the Reject Code field.

Setting Up the Forecast Definition

Forecasts in Oracle CRM On Demand automate the generation of sales forecasts according to the settings that you define. Forecasts are generated automatically on either a weekly or monthly basis. Each generated forecast is saved to the archive, providing a historical record that you can refer to and analyse.

Every forecast is a snapshot of information about revenue and potential revenue for the quarter. Forecasts enable sales professionals and managers to track their quarterly sales performance against planned quotas, actual closed revenue and expected revenue, given the current status of their sales opportunities.

Participants in forecasts are chosen by role. Your company's reporting structure, and the roles you choose for the forecast participants must be set up so that the participants roll up to one top-level user. Typically this top-level user is a company vice-president or chief executive officer (CEO).

When you generate a forecast, Oracle CRM On Demand alerts employees that the forecast has been created and is ready for review by posting an alert on My Homepage for each participant for two days. To extend the period during which the alert appears, update the Expiration Date field for that alert. For information on alerts, see Publishing Company-Wide Alerts (on page 86).

Determining the Forecast Type

Your company can base its forecasts on any of the following: opportunities, products, accounts, or contacts. There are four types of forecasts:

- Opportunity product
- Opportunity revenue
- Account revenue
- Contact revenue

Your company can generate multiple forecast types on the specified forecast dates set for forecast generation. When you select the forecast settings for your company, you determine which forecast types your entire company uses.

NOTE: Each forecast type requires sales employees to take certain actions. Make sure to communicate which types of forecast you will be using before your sales employees begin creating opportunity, account, and contact records.

Opportunity Product Forecasts

Opportunity product forecasts report on the products linked to an opportunity. The forecast numbers for the opportunity product forecasts are calculated from the Quantity, Revenue, and Expected Revenue fields on all products that are owned by a forecast participant and have revenue that is scheduled to be recognised during the forecast period. The revenue for a product can be reported at one time, or it can be reported during several periods.

Opportunity product forecasts require sales representatives to link products to their opportunity records. Sales representatives must also fill in the quantity, purchase price, and the start and close date to indicate which products they want to include in their forecasts.

To be included in the forecast, an opportunity product record must:

- Have a close date during the forecast period
- Be owned by a forecast participant

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see About Opportunities and Forecasts.

Set up an opportunity product forecast if your company wants to forecast one-time or recurring revenue that is based on products.

Opportunity Revenue Forecast

Opportunity revenue forecasts report on the revenue noted in the opportunity records. The forecast numbers are calculated from the Revenue and Expected Revenue fields on all opportunity records where the following conditions apply:

- The opportunity has a close date during the forecast period
- One of the following is true:
  - The opportunity is owned by a forecast participant
  - A forecast participant is a member of the opportunity team and has a share of the opportunity revenue that is greater than zero percent (that is, the value in the Percentage Split field on the Opportunity Team page is greater than zero).

    NOTE: For revenue on an opportunity to be shared among team members, the Enable Opportunity Revenue Split check box must be selected on the company profile.

Opportunity revenue forecasts require sales representatives to fill in the opportunity Revenue and Close Date fields to indicate which opportunities they want to include in their forecasts. Any linked products are ignored in the forecast.

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see About Opportunities and Forecasts.

Set up an opportunity revenue forecast if you want to forecast total opportunity revenue, regardless of how much revenue comes from individual products.

Account and Contact Revenue Forecasts

Account revenue and contact revenue forecasts report on the revenue listed on revenue records that are linked to account or contact records. The forecast numbers are calculated from the Revenue and Expected Revenue fields for the records that meet the criteria for inclusion in the forecast. To be included in the forecast, an account or contact revenue record must meet the following conditions:

- The record must be owned by a forecast participant.
- The record must have a status of Open, Pending, or Closed.
- The record must have the Forecast field selected.
- The record cannot be linked to an opportunity.
- The record must have revenue that is scheduled to be recognised during the forecast period.

The revenue for an account or contact can be reported at one time, or it can be set up to recur over time. Account revenue and contact revenue forecasts require users to link revenues to their account or contact records. Users must also update the Start/Close date, Status, and Forecast fields on the revenue record to indicate which products they want to include in their forecasts.

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see Tracking Revenue Based on Accounts, and Tracking Revenue Based on Contacts.

Set up an account or contact revenue forecast if your company wants to forecast one-time or recurring revenue.

Selecting Forecast Duration

You can configure forecasts to display revenue projections for up to four quarters. With the extended forecast capability, you can view a forecast for the current quarter, and for the following one, two, or three quarters.

By default, the forecast duration is set to one quarter (meaning only the current quarter is included in the forecast). When you change the duration setting to include multiple quarters, the forecast includes the current quarter as well as future quarters. For example, if you select a two-quarter forecast duration, the forecast includes the current quarter and the next quarter.

Designating Forecast Roles

As part of your forecast definition, you select which roles are to be included. When you add a role to the forecast definition, all users who are assigned that role are designated as forecast participants.

User Set-up for Forecasts

The users that you intend to include in your company's forecasts must be set up correctly. Their user records must meet the following conditions:

- The record must have a valid value in the Role field.
- The record must have a valid value in the Reports To field or in the Reports To (Alias) field, depending on which of these fields appears on the page layout for the user record.
- The status of the user must be set to Active unless you select the option to allow forecasts for inactive users.

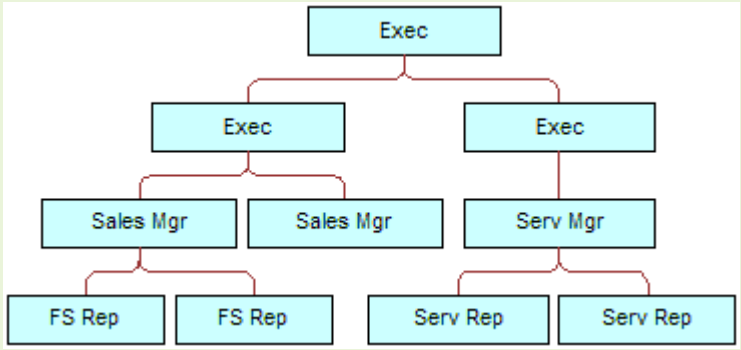
CAUTION: If any of the users included in the forecast are set up incorrectly, the entire forecast will fail.

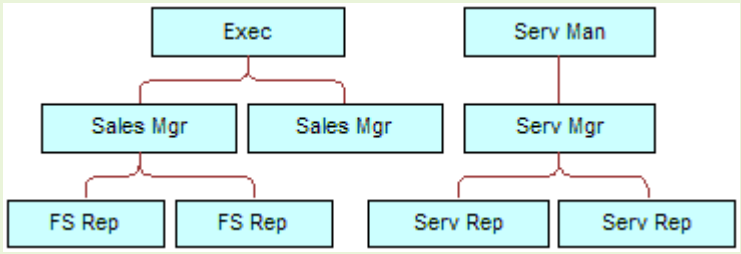
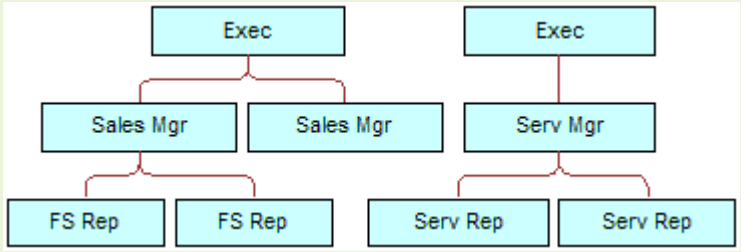
Examples of Reporting Structures and Roles for Forecasting

To generate forecasts you must set up your company's reporting structure correctly. The forecast hierarchy is based on the hierarchy specified in the Reports To or Reports To (Alias) field on the user records. All forecast participants, except for one top-level user, must report to another forecast participant, so that all individual forecasts roll up to one company-wide forecast. If there is more than one forecast participant who does not report to another forecast participant, or if any manager with forecast participants as direct reports has a status of Inactive, then the forecast will fail.

NOTE: If the forecast fails to generate because of a problem with the reporting structure, the primary contact (indicated on the company profile) receives an email notification from Customer Support. After the reporting structure has been corrected and the forecast has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

The following table shows reporting structure and participant role combinations that work and don't work for forecast generation.

For This Reporting Structure	Forecasting Works or Fails	Because
	Works with this role combination: ■ Executive ■ Sales Manager ■ Field Sales Rep	Participants roll up to one top-level participant.
	Fails with this role combination: ■ Sales Manager ■ Field Sales Rep	Participants do not roll up to one participant. They roll up to two sales managers.
	Fails with this role combination: ■ Executive	The field sales reps roll up to a sales manager who is not a

For This Reporting Structure	Forecasting Works or Fails	Because
	■ Field Sales Rep	participant.
	Works with this role combination: ■ Executive ■ Sales Manager ■ Field Sales Rep	Participants roll up to one participant.
	Fails with this role combination: ■ Executive ■ Sales Manager ■ Field Sales Rep	Two participants report to no one. Only one participant in the forecast (at the top of the structure) can report to no one.

Including Inactive Users in Forecasts

Forecasts can include inactive users as well as active users. When you set up your forecast definition, you indicate whether inactive users are to be included in the forecasts.

Allowing Managers to Submit Forecasts for their Direct Reports

When you set up your forecast definition, you indicate whether managers can automatically submit forecasts for their direct reports when they submit their forecasts.

Forecasts and Custom Fiscal Calendars

When using custom fiscal calendars, your company's custom fiscal calendar definition are used in the generation of forecasts and therefore the forecast period months align with the custom fiscal calendar months.

Your company administrator must create a custom fiscal calendar record for each year for which you want to create forecasts in Oracle CRM On Demand. If a sufficient number of fiscal calendars needed to support the selected forecast duration have not been created, it prevents the forecast series from generating and forecasts from being created.

NOTE: If the forecast fails to generate because of insufficient fiscal calendars, the primary contact (indicated on the company profile) receives an email notification from Customer Support. After the fiscal calendar records to support the forecast definition have been created, and the forecast definition has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

About the Email Notifications for Forecast Failures

In the email notifications that are sent when forecasts fail, the From address is always donotreply@crmondemand.com and the Sender field is always set to support@crmondemand.com. Oracle CRM On Demand appends a string to each email so that the email can be tracked in the email delivery system at Oracle. If the email recipient attempts to respond to the email, then the address in the To field in the reply is automatically set to support@crmondemand.com.

The following procedure describes how to set up the forecast definition.

To set up the forecast definition

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules & Assignment link.
3. Under the Forecast Administration section, click Forecast Definition.
4. On the Forecast Definition page, click Update.
5. In Step 1, Select Forecast Types, select the Active check box for each forecast type that you want to generate.

   Your company can forecast sales revenue that is based on opportunity products, opportunity revenue, account revenue, and contact revenue.
6. In Step 2, Select Forecast Frequency:

   a. In the Forecast Duration field, select the forecast duration.

      NOTE: The fiscal calendar settings selected for your company determine the duration of each quarter. The start date and end date of the forecast duration will be calculated according to the fiscal calendar start date and fiscal calendar type set on your company profile. For the fiscal calendar type of Custom Fiscal Calendar, the start and end dates are based upon the fiscal calendar as defined by your company administrator.

   b. In the Create Forecast Snapshot Each field, specify how frequently the forecast snapshot is to be created.

      You can select weekly or monthly or monthly forecasts.

      NOTE: If you select Month, the selected fiscal calendar type for your company determines the length of the month.

   c. In the Forecast Snapshot Day field, select the day of the month or the week that the forecast snapshot is to be created.

      Forecasts are generated at the start of the selected day (that is, at one minute past midnight) in the time zone of the hosting facility. If your forecast is monthly and the current month does not contain the day selected as the day for the forecast to be generated, Oracle CRM On Demand adjusts the snapshot to generate a forecast on the last day of the month. For example, if the Forecast Snapshot Day is set to the 30th, and the current month is February, Oracle CRM On Demand adjusts the forecast snapshot to generate the forecast on the 28th.

7 In Step 3, Select Forecast Roles:

   a Add the roles for those users who are to participate in the forecast to the Forecasting Roles area. Click the arrows to move company roles to the Forecast Roles list.

   b To allow forecasts for inactive users, select the Allow Forecasts for Inactive Users check box.

   c To allow a manager to submit forecasts automatically for their direct reports, select the Auto-submit forecasts for team upon manager submit check box.

8 Click Finish.

9 On the Forecast Definition page, verify the forecast details by reviewing the forecast snapshot frequency, the forecast snapshot day, next forecast series dates, and the list of forecast series participants.

CAUTION: After you set up your forecast definition, certain changes to user records or fiscal calendars require you to update your forecast definition settings. For more information, see Updating the Forecast Definition (on page 527).

Updating the Forecast Definition

You can update your company's forecast definition to change the forecast frequency, or to add or remove roles, and so on. In addition, when certain changes are made to user records, or if your fiscal calendar is modified, you must update the forecast definition so that it incorporates the changes.

You must update your forecast definition when any of the following changes are made:

- The manager for a forecast participant is changed. The manager information is stored on the user record of the forecast participant in the Reports To field or the Reports To (Alias) field, depending on which of these fields appears on the page layout for the user record.

  If the manager for a forecast participant is changed, then you must update the forecast definition as follows:

  - If the role assigned to the new manager is not currently included in the forecast definition, then you must add the role to the forecast definition.
  - If the role assigned to the new manager is currently included in the forecast definition, then you must refresh the forecast definition so that the new reporting structure is reflected in future forecasts.

    NOTE: The forecast participant hierarchy must include managers for everyone except the person at the top level.

- Users who are participants in the forecast hierarchy are deactivated.

  When an employee leaves your company, you must change the status for that user to Inactive. If the inactive employee was a manager in the forecast hierarchy, then the user record of any forecast participant who reports to that employee must also be updated.

  In this case, you must update the forecast definition as follows:

  - If the role assigned to the new manager is not currently included in the forecast definition, then you must add the role to the forecast definition.
  - If the role assigned to the new manager is currently included in the forecast definition, then you must refresh the forecast definition so that the new reporting structure is reflected in future forecasts.

NOTE: If your forecast definition allows forecasts for inactive users, then you do not need to update the forecast definition when a forecast participant is made inactive.

- Users are added to, or removed from the roles included in the forecast definition.

  In this case, you only need to refresh the forecast definition so that it incorporates the changes.

- Changes are made to your fiscal calendar.

  In this case, you only need to refresh the forecast definition so that it incorporates the changes.

  NOTE: You must refresh the forecast definition when a change is made to your fiscal calendar, regardless of the type of fiscal calendar your company uses (standard or custom).

NOTE: When any of the changes described here are made in Oracle CRM On Demand, the forecasts that are generated do not reflect the changes until the forecast definition is updated.

The following procedure describes how to update the forecast definition.

To update the forecast definition

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules & Assignment link.
3. Under the Forecast Administration section, click Forecast Definition.
4. On the Forecast Definition page, click Update.
5. In Step 1: Select Forecast Type, if any changes are needed, make the changes.
6. Click Step 2: Select Forecast Frequency.
7. If any changes are needed in Step 2: Select Forecast Frequency, make the changes.
8. Click Step 3: Select Forecast Roles.
9. If any changes are needed in Step 3: Select Forecast Roles, make the changes.
10. Click Finish.

    Your forecast definition is automatically updated and a summary of the definition, including the updated list of forecast participants, is displayed on the Forecast Definition page.

Setting Up Sales Processes, Categories and Coaches

You can create a customised sales methodology that reflects the requirements and complexity of your sales environment, and guides your sales representatives as they work on deals at various sales stages.

You can adjust the sales stage information to reflect your company's sales process or business practices. When employees create and update opportunities, they select a sales stage that represents how far advanced the opportunity is in the sales process. Each sales stage is tied to a percentage. That information is used with reports and forecasts, including your pipeline, expected revenue and closed revenue calculations.

As part of customising the sales stage values themselves, you can:

- Rename the sales stages
- Add or delete sales stages
- Change the sequence of the sales stages
- Change the probability percentages associated with the sales stages

About Sales Processes

Some sales environments require only one sales process with one set of sales stages. Other sales environments are more complex and require multiple sales processes with distinct sales stages for each process. For example, internal sales representatives might follow a different sales process from the one followed by field sales representatives.

In addition, sales representatives might need to follow different sales processes for different types of opportunities. For example, when your sales representatives are selling a piece of equipment, they might need to follow a longer, multi-stage sales process. But when they are selling a service contract, the process might be shorter and have fewer sales stages.

To further refine your sales methodology, you can define series of sales stages as sales processes and link each process to one of these:

- Opportunity type
- User's role

This allows you to customise the sales process (and sales stages with each process) for different opportunity types or different user roles.

Example: Your sales representative creates a new opportunity. When entering information about the opportunity, he or she selects Service from the Opportunity Type options. This causes the application to display the appropriate sales process for that opportunity type.

NOTE: The sales process based on opportunity type overrides the defaulted sales process based on a user's role. In other words, when an employee creates an opportunity, his or her role's default sales process is assigned to the opportunity. If he or she then selects an opportunity type that has an assigned sales process, the sales process for the opportunity is then driven based on the opportunity type he or she selected.

About Sales Stages in Searches and List Filters

The sales stages that a user can select in search criteria and list filters are determined as follows:

- In a targeted search of the Opportunity record type in the Action bar, if the Sales Stage field is available as a search field, then a user can select only the sales stages that are associated with the sales process that is specified for the user's role or the sales stages for the default sales process, if no sales process is specified for the user's role. The available sales stages are not limited by the opportunity type, even if the Opportunity Type field is available as a search field in the Action bar, and the user selects an opportunity type for the search.
- In an advanced search of the Opportunity record type, a user can select any of the sales stages that exist in Oracle CRM On Demand as filter values for the Sales Stage field. The available filter values are not limited to the sales stages for a specific sales process, even if a default sales process is specified for the role of the user who performs the search, or the user selects an opportunity type as a filter for the search.

- When setting up a list filter for the Opportunity record type, a user can select any of the sales stages that exist in Oracle CRM On Demand as filter values for the Sales Stage field. The available filter values are not limited to the sales stages for a specific sales process, even if a default sales process is specified for the role of the user who creates the list, or the user selects an opportunity type as a filter for the list.

About Sales Stage Categories

You can also set up sales stage categories, such as Stage 1, 2, or 3, which you can link to specific sales stages across different sales processes. When you need to consolidate information from different processes, you can run reports against the sales stage categories, providing an accurate view of your pipeline across all opportunity types or roles.

About Sales Process Coach

You can also use the Sales Process Coach to guide your team through the accurate completion of the necessary information at each sales stage. The Sales Process Coach provides specific steps for employees to follow as well as useful information, such as documents, templates and competitive information. You can also enforce the collection of information based on how opportunities progress through the sales cycle. In addition, when an opportunity record is saved, you can specify that certain tasks are automatically created and these then appear in your employee's task list.

As part of the sales process coach, you can:

- Add information for each sales stage that employees access through the Coach button
- Set up requirements for each sales stage, such as fields to be completed. These serve as prerequisites for saving the opportunity at a new stage.
- Set up automated tasks that are generated when employees save their opportunities with different sales stages

If you change any Sales Stage names after the system has been deployed, all previous records maintain their assigned Sales Stage until you manually update them.

NOTE: To change the default picklist values for the Probability % field, you need to edit that field from the Opportunity Field Set-up page (see Changing Picklist Values (on page 158)).

When setting up your sales methodology, complete the following general process:

1. Set up the sales stage categories (if you have more than one sales process).
2. Set up the sales process (or processes).
3. Set up the sales stages for each sales process.
4. Set up the coaching feature for the sales stages.

Before you begin:

- To perform this procedure, your role must include the Manage Data Rules - Manage Sales Stage Definition privilege.

- If you want to assign a sales process based on the Opportunity Type field, make sure that the picklist values are the ones you want to use. The default Opportunity Type values are Renewal and New Business. For instructions on customising picklist values, see Changing Picklist Values (on page 158).

  Also, make sure that the Opportunity Type field appears in the page layout for each role you want to use it with. For instructions, see Customising Static Page Layouts (on page 165).

To set up a sales stage category (optional)

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules & Assignment link.
3. In the Sales Methodology section, click the Sales Categories link.
4. From the Translation Language list, select your company's primary language.
5. On the Sales Stage Categories page, click New to create a new sales stage category, or select Edit from the record-level menu for the sales stage category you want to edit.
6. On the Edit Sales Stage Category page or the New Sales Stage Category page, complete the required information.

Field	Description
Stage Category	The name of the sales stage category.
Order	The sequence of the sales stage categories as they appear in Oracle CRM On Demand.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated into other languages activated for your company, select the Mark for Translation checkbox. When you add a new sales stage category name, the Mark for Translation check box is read-only. New names that you add automatically appear (without brackets and in black text) in the other activated languages. If you select the Mark for Translation check box when you update the name of a sales stage category, the updated name appears in the picklists for the other activated languages (in blue text with brackets) until you manually enter the translated versions. The blue text helps you to track which terms must be translated. If you do not select the Mark for Translation checkbox, the updated name does not appear in the other languages and the other languages are not affected by the changes that you make on this page.

7. Save the record.
8. To manually enter the translated equivalent of the new sales stage category:

a From the Translation Language list, select the language.

b Click the Edit link for the sales stage category.

c Enter the translated equivalent in the Stage Category field and click Save.

To set up a sales process

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

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Sales Methodology section, click the Sales Processes link.

4 From the Translation Language list, select your company's primary language.

5 On the Sales Process List page, click New to create a new sales process or select Edit from the record-level menu for the sales process you want to edit.

6 On the Sales Process Edit page, complete the required information.

Field	Description
Default Sales Process	Company's default sales process. If no other sales process is assigned to your user role or to the opportunity type for the record, this sales process is used.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated into other languages activated for your company, select the Mark for Translation checkbox.

7 Click Save.

8 To link the sales process to an Opportunity Type field value:

a On the Sales Process List page, click the Sales Process Name you want to link.

b In the Associated Opportunity Types title bar, click Add.

c Select the Opportunity Type and click Save.

NOTE: You can only link one sales process to each opportunity type. After that, the opportunity type value is removed from the picklist for selection with other sales processes. This prevents you from linking more than one sales process to an opportunity type.

When employees have records with the Opportunity Type field corresponding to the value you selected, they see the sales stages for this sales process.

9 To manually enter the translated equivalent of the new sales process:

a Go back to the Sales Process List page.

b From the Translation Language list, select the language.

c Click the Edit link for the sales process.

d Enter the translated equivalent in the Sales Process field and click Save.

10 To select the sales process to use as the default:

a On the Sales Process List page, click the Sales Process Name link of the sales process you want to set as the default.

b Click Edit.

c Select the Default Sales Process checkbox.

d Save the record.

NOTE: This sales process is displayed for records or roles that have no other linked sales process.

To set up sales stages for a sales process

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

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Sales Methodology section, click the Sales Processes link.

4 On the Sales Process List page, click the Sales Process Name link.

5 To set up a sales stage:

a In the Sales Stage title bar, click New to create a new sales stage, or select Edit in the record-level menu of the sales stage you want to edit.

b On the Sales Stage Edit page, complete the required information.

Field	Description
Default Probability	A percentage that reflects the confidence that the deal will close with the specified revenue on the specified close date. By default, the probability assigned to an opportunity adjusts automatically based on the sales stage of the opportunity. Users can manually override this value, but when a user selects a new sales stage for the opportunity, the value in the Probability percentage field of the opportunity is automatically updated to the default probability value for the new sales stage. **NOTE:** If the Mass Update feature is used to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field of the records is not updated to the

Field	Description
	default probability percentage for the new sales stage. **Important:** Do not set up any other Sales Stages with probabilities equal to 0 or 100 percent except Closed/Lost and Closed/Won. Modifying picklists that are used internally by the Oracle CRM On Demand application can have an adverse impact on standard functionality.
Order	Sequence of the Sales Stages as they appear in the picklist. If you add a Sales Stage, you need to change the order value for all subsequent Sales Stages. This way, you can ensure that the Sales Stage drop-down list in the Opportunity pages has the information in the correct order.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated into other languages activated for your company, select the Mark for Translation checkbox.
Stage Category	The name of the sales stage category that this sales stage falls under.

6 Save the record.

7 To manually enter the translated equivalent of the new sales stage:

a On the Sales Process Detail page, in the Sales Stage section, click Show Full List.

b In the Sales Stage page, in the Translation Language field, select the language.

c Click the Edit link for the sales stage.

d Enter the translated equivalent in the Sales Stage Name field and click Save.

8 Save the record.

To set up the coaching feature for the sales stages

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

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Sales Methodology section, click the Sales Processes link.

4 From the Translation Language list, select your company's primary language.

If you do not select your company's primary language, the Mark for Translation check box does not appear, and the application does not indicate untranslated terms you add here.

5 On the Sales Stage List page, click the sales stage link (in the Sales Stage column) that you want to set up the coaching information for.

6 To make a field required for this sales stage:

a In the Additional Required Fields title bar, click New.

b On the Edit Additional Required Field page, select the field from the list.

c Review the tips for entering default values that appear on-screen and then enter the value that you want to have as the default (optional) value.

When you enter a default value, the default value is only added to the record if that field is blank. For example, if the record already has a Revenue value, specifying a default value for Revenue here will not cause the revenue amount previously saved in the record to be overwritten.

d Save the record.

7 To add guidelines for the sales stage for your employees to review, such as objectives and milestones to be achieved in the stage:

a In the Process Coach Steps title bar, click New.

b On the Process Coach Step Edit page, enter a number to indicate the sequence for this information to appear.

When employees click the Coach button from their opportunity records, they can see the first 10 substeps. If you add more than 10, employees can view the entire list by clicking the Show Full List link.

c To mark the information for translation, select the Mark for Translation checkbox.

d Save the record.

When employees click the Coach button from their opportunity records for an opportunity record with this sales stage, this information appears on their Sales Process Coach page.

8 To add an attachment or URL for employees to access resources appropriate to the sales stage:

a In the Useful Resources title bar, click Add Attachment or Add URL.

b On the Attachment Edit or URL Edit page, enter the information.

c Save the record.

When employees click the Coach button from their opportunity records, the list of attachments or URLs linked to this sales stage appears on their Sales Process Coach page.

9 To define tasks that are automatically created when employees update the sales stage:

a In the Automated Tasks title bar, click New.

b On the Automated Tasks Edit page, enter the required information.

The information that you set up here serves as a template for each task. The newly-created task is linked to this opportunity, so it appears on the Opportunity Detail page as well as the appropriate activity lists.

NOTE: You must enter a number in the Due Date field to indicate how many days after the task is created that the task is due. For example, if the task is created on 6 December and you entered 10 here as the Due Date, the task appears on the employee's task lists as due on 16 December.

For Owner, the following behaviour applies:

- The task is created for every user with the role you select.
- If no user fulfils the account team role, the task is assigned to the opportunity owner.

NOTE: For information about how record ownership modes affect the ownership of automatically generated tasks, see Record Ownership Modes and Automatically Generated Tasks (on page 351).

c Save the record.

Customising Your Company's Industry List

The Industry field is a picklist field on a number of record types, including the Account, Application, Lead, and Partner record types. It is used to track the type of business that is associated with a record. You can add and remove industries, or change the display name of industries in the list, which enables you to change the industry picklist to match the nomenclature that your company uses.

NOTE: The number of industries that you can add to the list is not limited. However, only the first 300 active industries in the list are available for users to select in the picklist of values in the Industry field on a record detail page. The industry values are sorted in ascending ASCII code order, which means that the sort order is case sensitive. The values that start with a number appear first, followed by the values that start with an uppercase letter, followed by the values that start with a lowercase letter. An industry is active when the Enabled check box is selected for the industry.

The following procedure describes how to update an industry.

To update an industry

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

2 In the Business Process Management section, click the Data Rules and Assignment link.

3 In the Industry Definition section, click the Industry Definition link.

4 In the Industry Edit page, change the information for the industry as necessary.

5 Save your changes.

The following procedure describes how to add an industry.

To add an industry

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules and Assignment link.
3. In the Industry Definition section, click the Industry Definition link.
4. In the Industry Edit page, in the Translation Language field, select your company's primary language, and then click New.
5. In the new Industry Edit page, enter the information for the industry.
6. Save your changes.

NOTE: The Industry SIC Code is one of the fields on the Industry Edit page. The Standard Industrial Classification (SIC) system is a series of numeric codes that classify all businesses by the types of products or services that they make available. Businesses engaged in the same activity, whatever their size or type of ownership, are assigned the same SIC code. The SIC codes were developed to facilitate the collection, tabulation, and analysis of data; and also to improve the comparison of statistical analyses.

The following procedure describes how to enter the translated equivalent of an industry manually.

To manually enter the translated equivalent of an industry

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules and Assignment link.
3. In the Industry Definition section, click the Industry Definition link.
4. In the Industry Edit page, in the Translation Language field, select the language.
5. Enter the translated equivalent in the Display Name field.
6. Save your changes.

NOTE: When your company is first set up in Oracle CRM On Demand, the default names and the display names of the industries are generated in the default language for your company. If the default language for your company is later changed, then the display names of the industries appear in the new language. However, the default names of the industries continue to appear in the language that was originally the default language for your company.

Modification Tracking

As an administrator, you can track run-time modifications to record types using the modification tracking feature. When you enable the modification tracking feature for a record type, Oracle CRM On Demand logs all change events for that record type and writes a modification tracking record to the modification tracking event list. Oracle CRM On Demand permanently deletes old modification tracking records whenever a regular purge of deleted items occurs. An old record is defined as a record that is 30 days or older.

External applications that integrate with Oracle CRM On Demand, such as Oracle CRM On Demand Disconnected Mobile Sales, can use the modification tracking feature. In addition, external applications can read modification tracking entries using Web services. For information about using Web services to read modification tracking entries, see *Oracle Web Services On Demand Guide*.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Enabling the Modification Tracking Feature (on page 538)
- Record Types that are Tracked (on page 539)
- About Modification Tracking Events (on page 550)
- Viewing the Modification Tracking List Page (on page 551)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 548)
- Examples of Modification Tracking Event Records (on page 552)
- Creating Modification Records Manually (on page 556)

Enabling the Modification Tracking Feature

Use the following procedure to enable the modification tracking feature in Oracle CRM On Demand for all modules.

Before you begin. You must be signed in to Oracle CRM On Demand as administrator, and your role must include both the Manage Modification Tracking privilege and the Manage Roles and Access privilege. If the Manage Modification Tracking privilege is not enabled for your company administrator's role, then contact Oracle CRM On Demand Customer Care.

To enable the modification tracking feature for record types

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Enable Modification Tracking.
3. On the page that opens, select the Enable Modification Workflows check box for the record types (or object names) that you want to track.

   NOTE: You can disable the modification tracking feature for a record type by deselecting the Enable Modification Workflows check box for that record type.

   You can view the relevant modification information listed in the Modification Tracking List page by going to the Admin Homepage and clicking Modification Tracking in the Business Process Management section.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 537)
- Record Types that are Tracked (on page 539)
- About Modification Tracking Events (on page 550)
- Viewing the Modification Tracking List Page (on page 551)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 548)
- Examples of Modification Tracking Event Records (on page 552)
- Creating Modification Records Manually (on page 556)

Record Types That Are Tracked

This topic lists the record types for which Oracle CRM On Demand tracks change events. To use the modification tracking feature, you must select these record types. The record type names that are displayed on the Modification Tracking List page match the record type names displayed elsewhere in the Oracle CRM On Demand user interface. The record type names used in Oracle CRM On Demand Web service requests to retrieve modification tracking information must match the names as listed in the right-hand column in the following table.

NOTE: The record type names in the right-hand column are language independent.

The following table lists the record types that you can enable for the modification tracking feature in Oracle CRM On Demand.

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Account	Account
Account Address	AccountAddress
Account Book	AccountBook
Account Competitor	Competitor
Account Contact	AccountContact
Account Contact Role	ContactRole
Account Note	Note
Account Partner	Partner
Account Relationship	RelatedAccount
Account Team	AccountTeam
Accreditation	Accreditation

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Accreditation Book	AccreditationBook
Accreditation Request	AccreditationRequest
Accreditation Team	AccreditationTeam
Activity	Activity
Activity Attachment	Attachment
Activity User	User **NOTE:** If you want to track the changes for Activity User through the Owner field or the User related information section, then you must select the Activity, Activity User, User, and Position record types for modification tracking. By selecting these four record types, Oracle CRM On Demand properly tracks the Associate, WriteRecordUpdated, and Dissociate events when users are added or removed from an activity. It also generates the PreDeleteRecord and DeleteRecord change events for the Activity User intersection table when a user is deleted from an activity.
Address	Address **NOTE:** If you enable modification tracking for address records for your company and geocoding is also enabled in the company profile, then Oracle Maps Geocoder generates modification tracking entries for every address update it makes. You can track the updates that are made to the address records through the modification numbers in the associated modification tracking records for addresses.
Address Location	Address
Allocation	Allocation
Allocation Book	AllocationBook
Application	Application
Application Book	ApplicationBook
Application Team	ApplicationTeam
Assessment	SalesAssessment
Assessment Value	SalesAssessmentValue
Asset	Asset

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Auto Dealer Make	AutoDealerMakes
Auto Sales Hours	AutoSalesHours
Auto Service Hours	AutoServiceHours
Blocked Product	BlockedProduct
Book	Book
Book User	BookUser
Broker Profile	BrokerProfile
Business Plan	BusinessPlan
Business Plan Book	BusinessPlanBook
Business Plan Team	BusinessPlanTeam
Call Product Detail	ProductsDetailed
Call Product Detail Message Response	CallProdDetailMsgRsp
Call Product Detail Messaging Plan Item	CallProdDetailMsgPlanItem
Call Product Detail Messaging Plan Item Relations	CallProdDetailMsgPlnRel
Call Promotional Items Dropped	PromotionalItems
Call Sample Dropped	SampleDropped
Campaign	Campaign
Campaign Book	CampaignBook
Campaign Recipients	Recipient
Certification	Certification
Certification Book	CertificationBook
Certification Request	CertificationRequest
Certification Team	CertificationTeam
Claim	Claim
Contact	Contact
Contact Address	ContactAddress
Contact Best Time	ContactBestTimes
Contact Book	ContactBook
Contact Interests	Interests

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Contact Note	Note
Contact Portfolio	Contact
Contact Relationship	RelatedContact
Contact State Licence	ContactLicence
Contact Team	Team
Course	Course
Course Book	CourseBook
Course Enrolment	CourseEnrolment
Course Team	CourseTeam
Coverage	Coverage
Custom Object 01	CustomObject1
Custom Object 01 Book	CustomObject1Book
Custom Object 01 Team	Team
Custom Object 02	CustomObject2
Custom Object 02 Book	CustomObject2Book
Custom Object 02 Team	Team
Custom Object 03	CustomObject3
Custom Object 03 Book	CustomObject3Book
Custom Object 03 Team	Team
Custom Object 04	CustomObject4
Custom Object 04 Book	CustomObject4Book
Custom Object 04 Team	CustomObject4Team
Custom Object 05	CustomObject5
Custom Object 05 Book	CustomObject5Book
Custom Object 05 Team	CustomObject5Team
Custom Object 06	CustomObject6
Custom Object 06 Book	CustomObject6Book
Custom Object 06 Team	CustomObject6Team
Custom Object 07	CustomObject7
Custom Object 07 Book	CustomObject7Book

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Custom Object 07 Team	CustomObject7Team
Custom Object 08	CustomObject8
Custom Object 08 Book	CustomObject8Book
Custom Object 08 Team	CustomObject8Team
Custom Object 09	CustomObject9
Custom Object 09 Book	CustomObject9Book
Custom Object 09 Team	CustomObject9Team
Custom Object 10	CustomObject10
Custom Object 10 Book	CustomObject10Book
Custom Object 10 Team	CustomObject10Team
Custom Object 11	CustomObject11
Custom Object 11 Book	CustomObject11Book
Custom Object 11 Team	CustomObject11Team
Custom Object 12	CustomObject12
Custom Object 12 Book	CustomObject12Book
Custom Object 12 Team	CustomObject12Team
Custom Object 13	CustomObject13
Custom Object 13 Book	CustomObject13Book
Custom Object 13 Team	CustomObject13Team
Custom Object 14	CustomObject14
Custom Object 14 Book	CustomObject14Book
Custom Object 14 Team	CustomObject14Team
Custom Object 15	CustomObject15
Custom Object 15 Book	CustomObject15Book
Custom Object 15 Team	CustomObject15Team
NOTE: Your company might have set up additional custom objects and their child objects, which extend beyond Custom Object 15. These additional custom objects, along with their child objects, follow the same naming pattern as the preceding custom objects and their child objects.	
Damage	Damage
Deal Registration	DealRegistration

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Deal Registration Book	DealRegistrationBook
Deal Registration Team	DealRegistrationTeam
Dealer	Dealer
Dealer Territory	ChannelPartnerTerritory
Default Book by Record Type	UserUserDefaultBookPerType
Division	Division
Event	MedEd
Event Book	MedEdBook
EventTeam	MedEdTeam
Exam	Exam
Exam Book	ExamBook
Exam Registration	ExamRegistration
Exam Team	ExamTeam
Financial Account	FinancialAccount
Financial Account Book	FinancialAccountBook
Financial Account Holder	FinancialAccountHolder
Financial Account Holding	FinancialAccountHolding
Financial Plan	FinancialPlan
Financial Plan Book	FinancialPlanBook
Financial Product	FinancialProduct
Financial Transaction	FinancialTransaction
Fund	Fund
Fund Book	FundBook
Fund Debits	FundDebit
Fund Item	OccamFundCredit
Fund Membership	FundPartner
Fund Participant	FundParticipantUserSharing
Fund Request	FundRequest
HCP Contact Allocation	HCPContactAllocation
HCP Contact Allocation Book	HCPContactAllocationBook

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Household	Household
Household Contact	Contact
Household Team	Team
Insurance Property	InsuranceProperty
Inventory Audit Report	InventoryAuditReport
Inventory Audit Report Book	InventoryAuditReportBook
Inventory Period	InventoryPeriod
Inventory Period Book	InventoryPeriodBook
Invitee	Invitee
Involved Party	InvolvedParty
Lead	Lead
Lead Book	Book
Lead Partner	Partner
Lead Team	LeadTeam
MDF Request	MDFRequest
MDF Request Book	MDFRequestBook
MDF Request Team	MDFRequestTeam
Message Response	MessageResponse
Messaging Plan	MessagePlan
Messaging Plan Book	MessagePlanBook
Messaging Plan Item	MsgPlanItem
Messaging Plan Item Relations	MsgPlanItemRelation
Objective	Objectives
Objective Book	ObjectivesBook
Objective Team	ObjectivesTeam
Opportunity	Opportunity
Opportunity Book	Book
Opportunity Competitor	Competitor
Opportunity Contact Role	OpportunityContactRole
Opportunity Note	Note

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Opportunity Partner	Partner
Opportunity Team	Team
Order	Order
Order Book	OrderBook
Order Item	OrderItem
Order Team	OrderTeam
Partner	Partner
Partner Book	PartnerBook
Partner Programme	Programme
Partner Team	PartnerTeam
Period	CRMOD_LS_Period
Picklist	Picklist (Administrative API)
Picklist Value Group	PicklistValueGroup
Plan Account	PlanAccount
Plan Contact	PlanContact
Plan Opportunity	PlanOpportunity
Policy	Policy
Policy Book	PolicyBook
Policy Holder	PolicyHolder
Portfolio	Portfolio
Portfolio Team	Team
Position	User
Price List	PriceList
Price List Line Item	PriceListLineItem
Product	Product
Product Category	ProductCategory
Product Indication	ProductIndication
Programme Book	ProgrammeBook
Programme Membership	ProgrammePartner
Quote	Quote

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Related Disclaimer	RelatedDisclaimer
Revenue	Product
Sample Disclaimer	SampleDisclaimer
Sample Inventory	SampleInventory
Sample Lot	SampleLot
Sample Lot Book	SampleLotBook
Sample Request	SampleRequest
Sample Request Book	SampleRequestBook
Sample Request Item	SampleRequestItem
Sample Transaction	SampleTransaction
Sample Transaction Book	SampleTransactionBook
Service Request	ServiceRequest
Service Request Team	ServiceRequestTeam
Signature	Signature
Smart Call	Activity
Social Media	SocialMedia
Solution	Solution
Solution Book	SolutionBook
Special Pricing Product	SPRequestLineItem
Special Pricing Request	SPRequest
Special Pricing Request Book	SPRequestBook
Special Pricing Request Team	SPRequestTeam
Territory	Territory
Transaction Item	TransactionItem
User	User
User Division	UserDivision
User Owner	User
Vehicle	Vehicle
Vehicle Book	VehicleBook

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Vehicle Financial Information	EautoFinancialDetail
Vehicle Sales History	EautoSalesHistory
Vehicle Service History	EautoServiceHistory

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 537)
- Enabling the Modification Tracking Feature (on page 538)
- About Modification Tracking Events (on page 550)
- Viewing the Modification Tracking List Page (on page 551)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 548)
- Examples of Modification Tracking Event Records (on page 552)
- Creating Modification Records Manually (on page 556)

Modification Tracking Information for Changes to Lists of Values in Picklists

This topic describes how you can use the modification tracking feature to track changes to the list of values in picklists. To track changes to picklists, you enable Picklist for the modification tracking feature in addition to the record type that contains the picklist. Picklist is available as an object name in the Modification Tracking List page. Oracle CRM On Demand logs the name of a record type on the Modification Tracking List page for a create, read, update, or delete operation on the picklist for the record type, if the modification tracking feature is enabled for the Picklist object. The following table describes the columns in the Modification Tracking List page when you enable the modification tracking feature for the Picklist object.

Column Heading	Description
Object Name	Picklist.
Object Id	The row identifier for the object that Oracle CRM On Demand assigns, for example, 1QA2-NX0XH. This identifier is unique to the list of values associated with a picklist. Certain fields use the same list of values across multiple objects. If a user edits any value in the list of values, then Oracle CRM On Demand logs modification tracking entries for all the fields. In this case, the object identifier is the same for all such modification tracking entries.

Column Heading	Description
Record Type	The modification tracking name of the record type whose picklist is edited. It is the name of the record type as it appears in the Modification Tracking Page when the record type is tracked.
Field Name	The Web services version 2.0 tag of the picklist field that is edited.

Whenever you edit a picklist field, an entry appears in the Modification Tracking List page, but only if you have enabled the record type whose picklist field you are editing for the modification tracking feature. A single edit to a picklist field on a particular record type can cause multiple entries to be recorded in the Modification Tracking List page because Oracle CRM On Demand maps the picklist fields to the list of value types that are shared among multiple picklist fields across record types. The number of entries is equal to the number of public fields that are mapped to the list of value types of the picklist fields that you edit.

For example, assume that you have a picklist called Picklist Role, with a list of values type set to PARTY_REL_TYPE, and this picklist is also used by the following record types: Account Partner, Account Competitor, Opportunity Competitor, Opportunity Partner. Assume that the picklist is also used by two fields in these record types: Role and Reverse Role. If you update the list of values for any picklist field in this example, then Oracle CRM On Demand creates separate modification tracking entries for all the picklist fields in the example.

Restrictions for Modification Tracking for a List of Values in Picklists

Oracle CRM On Demand does not create modification tracking events for a list of values in picklists with the following conditions:

- The record type associated with the picklist is not set up for your company.
- The picklist updates belong to record types that are not enabled for the modification tracking feature.
- The updated picklist field is not accessible through Web services.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 537)
- Enabling the Modification Tracking Feature (on page 538)
- Record Types that are Tracked (on page 539)
- About Modification Tracking Events (on page 550)
- Viewing the Modification Tracking List Page (on page 551)
- Examples of Modification Tracking Event Records (on page 552)
- Creating Modification Records Manually (on page 556)

About Modification Tracking Events

The following table lists the modification tracking events that are created and displayed in the Modification Tracking List page.

Event Name	Description
Associate	This event indicates the association of two records that have a many-to-many relationship, such as contacts and accounts. For example, an associate event occurs when you add a contact to an account record. Similarly, a Dissociate event occurs when you delete a contact from an account record.
DeleteRecord	This event indicates that a record has been marked for deletion, for example, when you delete a messaging plan record. Use this event to track the deletion of records.
Dissociate	This event indicates the disassociation of two records that have a many-to-many relationship. For example, a dissociate event occurs when you delete a contact from an account record.
MergeRecords	This event indicates that two records are merged, for example, when a duplicate Lead record and its child records are merged with a primary Lead record. In this example, the resulting merged record's object ID is the primary Lead record's row ID and the child record's object ID is the duplicate Lead record row ID. The MergeRecords event is supported for the following record types: Account, Contact, Household, Lead, Partner, Portfolio, and Service Request. **NOTE:** Oracle CRM On Demand does not log separate MergeRecords events for child-level record merges.
PreDeleteRecord	This event indicates that a record is about to be deleted, however, the record might not actually be deleted. **NOTE:** It is recommended that you do not to use this event for tracking deleted records. If you intend to track the deletion of records, then use the DeleteRecord event instead.
RestoreRecord	This event indicates that a record, previously marked for deletion, has been restored, for example, when you restore a messaging plan record that was previously marked for deletion.
WriteRecordNew	This event indicates that a new record has been saved for a record type, for example, when you create a new account record. This event also indicates modifications to picklists.
WriteRecordUpdated	This event indicates that an existing record for a parent record type or a child object has been modified, for example, when you update an existing contact record.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 537)

- Enabling the Modification Tracking Feature (on page 538)
- Record Types that are Tracked (on page 539)
- Viewing the Modification Tracking List Page (on page 551)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 548)
- Examples of Modification Tracking Event Records (on page 552)
- Creating Modification Records Manually (on page 556)

Viewing the Modification Tracking List Page

This topic describes how to view modification tracking information.

Before you begin. You must be signed in to Oracle CRM On Demand as administrator, and your role must include the Manage Modification Tracking privilege. If the Manage Modification Tracking privilege is not enabled for your company administrator's role, then contact Oracle CRM On Demand Customer Care.

To view the Modification Tracking List Page

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Modification Tracking.

   The Modification Tracking List page opens showing a list of all modification tracking records. For examples of modification tracking records, see Examples of Modification Tracking Event Records (on page 552).

   The following table describes the Modification Tracking List page.

Column Heading	Description
Object Name	The name of the object to which the tracking event applies, for example, Contact. The object name is usually a record type name, or it can be Picklist.
Object Id	The row identifier for the object that Oracle CRM On Demand assigns, for example, 1QA2-NX0XH.
Child Object Name	The name of the child object to which the tracking event applies, for example, Contact Address. The child object name appears only if it is applicable to the modification event; that is, the object is modified as a child of another object in its view, for example, modifying an address in a contact view.
Child Object Id	The object identifier for the child object that Oracle CRM On Demand assigns, for example, 1QA2-OBA65.
Event Name	The name of the event, for example, WriteRecordNew, when a new record is created. For information on the event names, see the event name descriptions in About Modification Tracking Events (on page 550).

Column Heading	Description
Record Type	The record type for which an administrator makes a configuration change that triggers modification tracking. The Record Type field is populated only for a configuration change. An example of modification tracking for a configuration change is when an administrator edits a list of values in a picklist field. In this case, the Record Type field logs the name of the object to which the edited picklist field belongs.
Field Name	The Web service version 2.0 tag for a field when you edit a picklist for that field. For custom picklist fields, the Web service version 2.0 tag is the generic integration tag. This field is populated only for picklist edits.
Modification Number	A counter for the number of times that the record has been modified. When a record is initially created, the modification number is set to zero (0) and incremented for each modification that is made to the record.
Modified: Date	The date (MMDDYYY) and time (HH:MM:AM|PM) when the modification event has taken place.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 537)
- Enabling the Modification Tracking Feature (on page 538)
- Record Types that are Tracked (on page 539)
- About Modification Tracking Events (on page 550)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 548)
- Examples of Modification Tracking Event Records (on page 552)
- Creating Modification Records Manually (on page 556)

Examples of Modification Tracking Event Records

This topic provides several examples of modification tracking event records created by Oracle CRM On Demand for certain user actions. After the modification tracking feature is enabled, event records are listed in the Modification Tracking List Page, as shown in the following examples. Depending on the type of user action and the relationship of the record types recorded, several records can be written as a result of one event. For example, if there is a one-to-many parent-child relationship or a many-to-many object-to-object relationship, several records can be written.

Example 1: Modification Tracking Record for Creating a New Account Record

In this example, a user creates a new account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	WriteRecordNew	None	None	0	03/26/2014 09:28 AM

Example 2: Modification Tracking Record for Updating an Existing Account Record

In this example, a user updates an existing account record by modifying a field in the account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	1	03/26/2014 09:52 AM

Example 3: Modification Tracking Record for Deleting an Existing Account Record

In this example, a user deletes an existing account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	PreDeleteRecord	None	None	2	03/26/2014 09:58 AM
Account	1QA2-OD54E	None	None	DeleteRecord	None	None	3	03/26/2014 10:00 AM

Example 4: Modification Tracking Record for Restoring an Account Record Marked for Deletion

In this example, a user restores a record marked for deletion before it is purged from Oracle CRM On Demand. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	RestoreRecord	None	None	3	03/26/2014 10:03 AM

Example 5: Modification Tracking Record for Associating an Account Record with a Contact Record

In this example, in a contact record, a user adds an existing account record to the contact record; that is, the user associates the account record with the contact record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Contact	1QA2-OD635	Account	1QA2-OD54E	Associate	None	None	0	03/26/2014 10:16 AM
Contact	1QA2-OD635	None	None	WriteRecordUpdated	None	None	1	03/26/2014 10:16 AM
Contact	1QA2-OD635	Account Contact	1QA2-OD639	WriteRecordUpdated	None	None	1	03/26/2014 10:16 AM
Account	1QA2-OD54E	Contact	1QA2-OD635	Associate	None	None	0	03/26/2014 10:16 AM
Account	1QA2-OD54E	Contact	1QA2-OD635	WriteRecordUpdated	None	None	4	03/26/2014 10:16 AM
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	4	03/26/2014 10:16 AM
Contact	1QA2-OD635	Account	1QA2-OD54E	WriteRecordUpdated	None	None	4	03/26/2014 10:16 AM

Example 6: Modification Tracking Record for Disassociating an Account Record From a Contact Record

In this example, a user removes a related account record from a contact; that is, the user disassociates the account record from the contact record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	5	03/26/2014 10:35 AM

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Contact	1QA2-OD635	None	None	WriteRecordUpdated	None	None	2	03/26/2014 10:35 AM
Contact	1QA2-OD635	Account	1QA2-OD54E	Dissociate	None	None	1	03/26/2014 10:35 AM
Account	1QA2-OD54E	Contact	1QA2-OD635	Dissociate	None	None	1	03/26/2014 10:35 AM

Example 7: Modification Tracking Record for Adding a Child Record to a Parent Account Record

In this example, in an account record, a user creates a new address record as a related item; that is, the user adds the account address as a child record of the parent account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	Address	1QA2-OD6PM	WriteRecordNew	None	None	0	03/26/2014 11:44 AM
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	6	03/26/2014 11:44 AM

Example 8: Modification Tracking Record for Updating an Existing Child Record

In this example, in an account record, a user updates an existing address record; that is, the user updates the account address as a child record of the parent account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	Address	1QA2-OD6PM	WriteRecordUpdated	None	None	1	03/26/2014 11:51 AM

Example 9: Modification Tracking Record for Updating an Existing Child Record

In this example, in an account record, a user deletes the existing address record; that is, the user deletes the account address as a child record of the parent account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	8	03/26/2014 12:00 PM
Account	1QA2-OD54E	Address	1QA2-OD6PN	None	None	None	1	03/26/2014 12:00 PM

Example 10: Modification Tracking Record for Updating a Picklist Value

In this example, in an account, a user updates a picklist, that is, the user customises an existing Priority picklist field on an Account record by adding a value called Indeterminate. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Picklist	1QA2-OD54E	None	None	WriteRecordUpdated	Account	Priority	8	03/26/2014 1:00 PM

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 537)
- Enabling the Modification Tracking Feature (on page 538)
- Record Types that are Tracked (on page 539)
- About Modification Tracking Events (on page 550)
- Viewing the Modification Tracking List Page (on page 551)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 548)
- Creating Modification Records Manually (on page 556)

Creating Modification Records Manually

Although the modification tracking feature enables Oracle CRM On Demand to write and track event records automatically, you can create event records manually. This feature might be useful if you want to record events that are external to Oracle CRM On Demand.

Before you begin. You must be signed in to Oracle CRM On Demand as administrator, and your role must include the Manage Modification Tracking privilege. If the Manage Modification Tracking privilege is not enabled for your company administrator's role, then contact Oracle CRM On Demand Customer Care.

To create modification records manually

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Modification Tracking.
3. From the Modification Tracking List page, click New.
4. Complete the fields as described in the following table, and then save the record.

Field	Description
Key Modification Tracking Information	
Object Name	The name of the record type to which the tracking event applies, for example, Contact. The object name is usually a record type name, or it can be Picklist. (Required)
Object Id	The row identifier for the record type, typically assigned by Oracle CRM On Demand, for example, 1QA2-NX0XH. (Required)
Child Object Name	The name of the child record to which the tracking event applies, for example, Contact Address. The child record name appears only if it is applicable; that is, the object is modified as a child of another record in its view, for example, modifying an address in a contact view.
Child Row Id	The row identifier for the child record, which Oracle CRM On Demand assigns, for example, 1QA2-OBA65.
Event Name	The name of the event, for example, WriteRecordNew, when a new record is created. See the table of event name descriptions in About Modification Tracking Events (on page 550) for more information on the possible event names. (Required)
Modification Number	A counter for the number of times that the record has been modified. When a record is initially created, the modification number is set to 0 (zero) and incremented for each modification that is made to the record. (Required)
Record Type	The record type for which an administrator makes a configuration change that triggers the modification tracking feature. The Record Type field is populated only for a configuration change. An example of modification tracking for a configuration change is when an administrator edits a list of values in a picklist field. In this case, the Record Type field logs the name of the object to which the edited picklist field belongs.
Field Name	The Web service version 2.0 tag for a field when you edit a picklist for that field. For custom picklist fields, the Web service version 2.0 tag is the generic integration tag. This field is populated only for picklist edits.

Field	Description
Modified: Date	The date (MMDDYYY) and time (HH:MM:AM|PM) when the modification event has taken place.

Related Topics

For related information on modification tracking, see the following topics:

- Modification Tracking (on page 537)
- Enabling the Modification Tracking Feature (on page 538)
- Record Types that are Tracked (on page 539)
- About Modification Tracking Events (on page 550)
- Viewing the Modification Tracking List Page (on page 551)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 548)
- Examples of Modification Tracking Event Records (on page 552)

Data Management Tools

From the Data Management Tools section of the Admin Homepage, you can perform the following tasks:

- Import and export your company data. For more information, see Import and Export Tools (on page 558).
- View batch delete and restore requests. For more information, see Batch Delete and Restore Queue Page (on page 797) .
- View batch book assignment requests. For more information, see Batch Assign Book Queue Page (on page 799).
- Create and administer the integration event queues. For more information, see About Integration Events (on page 801).

Import and Export Tools

Several utilities are available from the Import and Export Tools page, which augment the import and export facilities in Oracle CRM On Demand:

- **Import Assistant.** For more information, see Import Assistant (on page 776).
- **Oracle Data Loader On Demand.** For more information, see Oracle Data Loader On Demand Client Utility (on page 789).

- **Oracle Migration Tool On Demand.** For more information, see Oracle Migration Tool On Demand Client Utility (on page 795).
- **Oracle Web Services.** For more information, see Web Services Integration (on page 790).

For more information about choosing an appropriate import method, see 1801156.1 (Article ID) on My Oracle Support.

The import process consists of the following steps:

- Preparing for Data Importing (on page 607)
- Importing Your Data (on page 776)
- Reviewing Import Results (on page 781)

You can also export data from Oracle CRM On Demand to CSV files. For information about exporting, click a topic:

- Exporting Your Data (on page 783)
- Reviewing Export Results (on page 787)

Before you begin:

- To import data, your role must include either the Admin Import privilege or the Marketing Import privilege. The Admin Import privilege lets you import all record types, whereas the Marketing Import privilege lets you import only accounts, contacts, and leads.
- If a user wants to import up to 2000 contacts, you must enable the Personal Import privilege for the user's role. The Personal Import privilege provides greater control over a user's data imports. For more information on roles, see Adding Roles (on page 309).
- Review this entire section as well as the tutorial lessons on importing records, which provide additional information for performing imports (best practices).

  CAUTION: You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5 to 10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on data importing or contact Customer Care. For information on those resources, click the Training and Support global link at the top of each page in Oracle CRM On Demand.
- Be aware that you cannot import or export concatenated fields in Oracle CRM On Demand. A concatenated field is a field that can display the values from multiple fields and can also display additional text. However, you can import and export the individual fields that make up the concatenated fields.
- To export data, your role must include the Admin Export privilege.

You can import data from comma-separated value (CSV) files to automatically create records in Oracle CRM On Demand. Each CSV file must be less than 20 MB in size. To reduce the file size, either divide the records into several files, or reduce the data by deleting the columns that you do not want to import. You can view a sample CSV file in Oracle Data Loader On Demand Guide.

This table describes what types of records you can create by importing data and how many records you can import each time that you run the import process.

Record Type	Record Limit for Each Import

Record Type	Record Limit for Each Import
Account	30000
Account Address	50000
Account Competitor	50000
Account Contact	50000
Account Partner	50000
Account Team	50000
Address	30000
Appointment	30000
Appointment Contact	50000
Appointment User	50000
Asset	80000
Contact (Admin)	30000
Contact Address	50000
Contact Team	50000
Campaign	50000
Campaign Recipient	50000
Deal Registrations	30000
Lead	30000
Modification Tracking	30000
Note	50000
Order	30000
Order Item	30000
Opportunity	30000
Opportunity Contact Role	50000
Opportunity Product	80000
Opportunity Team	50000
Product	80000
Product Category	30000

Record Type	Record Limit for Each Import
Property	30000
Social Profile	30000
Solution	50000
Service Request	30000
Task	30000
Task Contact	50000
Task User	50000
User	500
Vehicle Contact	50000

Depending on the industry-specific solutions you have implemented, the following records can be made available to import:

Record Type	Record Limit for Each Import
Allocation	30000
Application	30000
Blocked Product	30000
Business Plan	30000
Claim	30000
Contact State Licence	30000
Coverage	30000
Custom Objects	30000
Damage	30000
Dealer	80000
Deal Registration	30000
Event	30000
Financial Account	30000
Financial Account Holder	30000
Financial Account Holding	30000
Financial Plan	30000

Record Type	Record Limit for Each Import
Financial Product	30000
Financial Transaction	30000
HCP Contact Allocations	30000
Inventory Audit Report	30000
Inventory Period	30000
Involved Party	30000
Insurance Property	30000
MDF Request	30000
Messaging Plan	30000
Messaging Plan Item	30000
Messaging Plan Item Relation	30000
Message Response	30000
Objective	30000
Partner	30000
Partner Program	30000
Plan Account	30000
Plan Contact	30000
Plan Opportunity	30000
Policy	30000
Policy Holder	30000
Portfolio	30000
Price List	30000
Price List Line Item	30000
Sample Disclaimer	30000
Sample Inventory	30000
Sample Lot	30000
Sample Transaction	30000
Signature	30000

Record Type	Record Limit for Each Import
Special Pricing Product	30000
Special Pricing Request	30000
Transaction Item	30000
Vehicle	80000

About Countries and Address Mapping

The following table shows:

- Picklist values for the Country field in Oracle CRM On Demand

  The picklist values for the Country field in Oracle CRM On Demand cannot be edited. To capture all the data when importing your files, make sure your countries match the permissible names exactly, including punctuation and capitalisation. Otherwise, the information is not imported.

  NOTE: Because the Country picklist values have a 30-character limit, some names that exceed that limit are truncated in the picklist.

- Mappings for addresses per country

  When importing your data, you must set up columns for each of the address fields that Oracle CRM On Demand uses. The following table shows how you want to map the address fields for each country to the appropriate fields within Oracle CRM On Demand. Mapping correctly ensures that you capture all the data in your files under the correct fields in the application.

NOTE: In addition to sovereign states, the following table includes other entities, such as dependencies, foreign territories, and regions of sovereign states. For example, the Isle of Man is a British crown dependency, and Svalbard is a region in Norway.

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
USA	8	Number/ Street	Address 2	Address 3	City	County	US State	Zip	
Afghanistan	6	Address 1	Address 2		City			Post Code	Province
Aland Islands	5	Number/Street	Address					Post	Island

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
			2					Code	
Albania	6	Address 1	Address 2		City			Post Code	Province
Algeria	5	Number/ Street	Address 2		City			Post Code	
American Samoa	6	Address 1	Address 2		City			Post Code	Province
Andorra	5	Number/ Street	Address 2		City			Post Code	
Angola	4	Street/ Number	Address 2		City				
Anguilla	6	Address 1	Address 2		City			Post Code	Province
Antigua and Barbuda	4				City	PO Box			Island
Argentina	7	Number/ Street	Address 2	Address 3	City			Post Code	Province
Armenia	5	Street/ Number	Address 2		City			Post Code	
Aruba	5	Number/ Street	Address 2	Floor	City				
Ascension Island	6	Address 1	Address 2		City			Post Code	Province
Australia	6	Number/ Street	Address 2	Address 3	City			Post Code	State
Austria	5	Street/ Number	Address 2		City			Post Code	
Azerbaijan	5	Street/ Number	Address 2		City			Post Code	
Bahamas	6	Address 1	Address 2		City			Island Code	Island
Bahrain	5	Number/ Street	Address 2		City			Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Bangladesh	5	Street/ Number	Address 2		City			Post Code	
Barbados	6	Address 1	Address 2		City			Post Code	Province
Belarus	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Belgium	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Belize	5	Number/ Street	Address 2	Floor	City				
Benin	4				City	Sorting Code		Boite Postale	
Bermuda	5	Number/ Street	Address 2		City			Post Code	
Bhutan	6	Address 1	Address 2		City			Post Code	Province
Bolivia	4	Street/ Number	Address 2		City				
Bonaire, Sint Eustatius, and Saba	5	Address 1	Address 2		City				Island
Bosnia and Herzegovina	5	Street/ Number	Address 2		City			Post Code	
Botswana	3				City	PO Box			
Bouvet Island	6	Address 1	Address 2		City			Post Code	Province
Brazil	7	Street/ Number	Address 2	Floor	City			Post Code	State
British Indian Ocean Territory	6	Address 1	Address 2		City			Post Code	Province
Brunei Darussalam	5	Number/ Street	Address 2		City			Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Bulgaria	5	Street/ Number	Address 2		City			Post Code	
Burkina Faso	4				City	Sorting Code		Boite Postale	
Burundi	3				City	PO Box			
Cambodia	6	Address 1	Address 2		City			Post Code	Province
Cameroon	3				City	PO Box			
Canada	6	Number/ Street	Address 2		City			Post Code	Province
Cape Verde	4	Street/ Number	Address 2		City				
Cayman Island	6	Address 1	Address 2		City			Post Code	Province
Central African Republic	3				City	PO Box			
Chad	3				City	PO Box			
Channel Islands	6	Address 1	Address 2		City			Post Code	Province
Chile	7	Street/ Number	Address 2	Floor	City	Commune		Post Code	Province
China	7	Number/ Street	Address 2	District	City			Post Code	Province
Christmas Island	6	Address 1	Address 2		City			Post Code	Province
Cocos (Keeling) Islands	6	Address 1	Address 2		City			Post Code	Province
Colombia	7	Street/ Number	Address 2	Floor	City	Sorting Code			Province
Congo	3	Street/Number			City				

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Congo, The Democratic Republic	4				City	Sorting Code		Boite Postale	
Cook Islands	6	Address 1	Address 2		City			Post Code	Province
Costa Rica	7	Street/ Number	Address 2	Floor	City			Post Code	Province
Croatia	5	Street/ Number	Address 2		City			Post Code	
Cuba	4	Street/ Number			City			Codigo Postal	
Curacao	6	Address 1	Address 2		City			Post Code	Province
Cyprus	5	Number/ Street	Address 2		City			Post Code	
Czech Republic	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Denmark	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Djibouti	3				City	PO Box			
Dominica	6	Address 1	Address 2		City			Post Code	Province
Dominican Republic	6	Number/ Street	Address 2		City			Post Code	Province
East Timor	5	Street/ Number	Address 2		City			Post Code	
Ecuador	7	Address 1	Address 2	Floor	City			Post Code	Province
Egypt	6	Address 1		District	City			Post Code	Province
El Salvador	5	Street/ Number			City			Post Code	Province
Equatorial Guinea	3				City	PO Box			

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Eritrea	3	Street/ Number			City				
Estonia	5	Street/ Number	Address 2		City			Post Code	
Ethiopia	3				City	PO Box			
Falkland Islands (Malvinas)	3	Street/ Number			City			Post Code	
Faroe Islands	6	Address 1	Address 2		City			Post Code	Province
Fiji	5	Number/ Street	Address 2	Floor	City				
Finland	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
France	6	Number/ Street	Address 2		City	CEDEX Code		Post Code	
French Guiana	5	Number/ Street	Address 2		City			Post Code	
French Polynesia	5	Number/ Street	Address 2		City			Post Code	
French Southern Territories	5	Number/ Street	Address 2		City			Post Code	
Gabon	3				City	PO Box			
Gambia	3	Street/ Number			City				
Georgia	5	Number/ Street	Address 2		City			Post Code	
Germany	5	Street/ Number	Address 2		City			Post Code	
Ghana	3				City	PO Box			
Gibraltar	3	Street/ Number			City				

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Greece	5	Street/ Number	Address 2		City			Post Code	
Greenland	5	Street/ Number	Address 2		City			Post Code	
Grenada	6	Address 1	Address 2		City			Post Code	Province
Guadeloupe	5	Number/Street	Address 2		City			Post Code	
Guam	6	Address 1	Address 2		City			Post Code	Province
Guatemala	5	Street/ Number			City			Codigo Postal	Province
Guernsey	6	Number/Street	Address 2	Address 3				Post Code	Island
Guinea	3				City	PO Box			
Guinea-Bissau	4	Street/ Number			City			Codigo Postal	
Guyana	6	Address 1	Address 2		City			Post Code	Province
Haiti	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Heard and McDonald Islands	6	Address 1	Address 2		City			Post Code	Province
Holy See (Vatican City State)	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Honduras	7	Street/ Number	Address 2	Floor	City			Post Code	Province
Hong Kong	7	Number/ Street	Address 2	District	City	Address 4			Part of Territory
Hungary	5	Street/ Number	Address 2		City			Post Code	
Iceland	5	Street/ Number	Address 2		City			Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
India	6	Number/ Street	Address 2		City			Post Code	State
Indonesia	5	Street/ Number	Address 2		City			Post Code	
Iran	5	Number/ Street	Address 2		City			Post Code	
Iraq	6	Address 1	Address 2		City			Post Code	Province
Ireland	6	Number/ Street	Address 2	Address 3	City	County		Eircode	
Isle of Man	7	Number/Street	Address 2	Address 3	City	County		Post Code	
Israel	5	Number/ Street	Address 2		City			Post Code	
Italy	6	Street/ Number	Address 2		City			Post Code	Province
Ivory Coast	4				City	Sorting Code		Boite Postale	
Jamaica	6	Number/ Street	Address 2		City	Sorting Code			Parish
Japan	6	Number/Street/Chome	Ku		ShiGun			Post Code	Prefecture
Jersey	5	Street/Number	Address 2					Post Code	Parish
Jordan	5	Number/ Street	Address 2		City			Post Code	
Kazakhstan	4	Address 1			City			Post Code	
Kenya	4				City	PO Box		Post Code	
Kiribati	4	Address 1			City				Island
Korea	6	Address 1	Address 2		City			Post Code	Province

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Korea, Democratic People's Republic	5	Number/ Street	Address 2		City			Post Code	
Kosovo	6	Street/ Number	Address 2	District	City			Post Code	
Kuwait	6	Street/ Number	Address 2		City	County		Post Code	
Kyrgyzstan	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Laos	5	Number/ Street	Address 2		City			Post Code	
Latvia	5	Street/ Number			City	Sorting Code		Post Code	
Lebanon	6	Address 1	Address 2		City			Post Code	Province
Lesotho	3				City	PO Box			
Liberia	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Libya	5	Number/ Street	Address 2	Floor	City				
Liechtenstein	5	Street/ Number	Address 2		City			Post Code	
Lithuania	4	Street/ Number			City			Codigo Postal	
Luxembourg	5	Number/ Street	Address 2		City			Post Code	
Macau	6	Address 1	Address 2		City			Post Code	Province
Macedonia	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Madagascar	5	Street/ Number	Address 2		City			Post Code	
Malawi	3				City	PO Box			

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Malaysia	7	Number/ Street	Address 2	Address 3	City			Post Code	State
Maldives	5	Number/ Street	Address 2		City			Post Code	
Mali	5	Number/ Street	Address 2	Floor	City				
Malta	6	Number/ Street	Address 2		City			Post Code	Island
Marshall Islands	6	Number/ Street	Address 2		City			Zip	State
Martinique	5	Number/ Street	Address 2		City			Post Code	
Mauritania	3				City	PO Box			
Mauritius	3	Street/ Number			City				
Mayotte	5	Number/ Street	Address 2		City			Post Code	
Mexico	8	Street/ Number	Address 2	Floor	City	Colonia/ Section		Post Code	State
Micronesia	6	Address 1	Address 2		City			Post Code	Province
Moldova, Republic of	5	Street/ Number	Address 2		City			Post Code	
Monaco	5	Number/ Street	Address 2		City			Post Code	
Mongolia	5	Street/ Number	Address 2		City			Post Code	
Montenegro	6	Address 1	Address 2		City			Post Code	Province
Montserrat	6	Address 1	Address 2		City			Post Code	Province
Morocco	5	Number/ Street	Address 2		City			Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Mozambique	4	Street/ Number			City			Codigo Postal	
Myanmar	5	Address 1			City	Township		Post Code	
Namibia	3				City	PO Box			
Nauru	3			District		PO Box			
Nepal	5	Street/ Number	Address 2		City			Post Code	
Netherlands	5	Street/ Number	Address 2		City			Post Code	
Netherlands Antilles	5	Address 1	Address 2		City				Island
New Caledonia	5	Number/ Street	Address 2		City			Post Code	
New Zealand	6	Number/ Street	Address 2	District	City			Post Code	
Nicaragua	6	Street/ Number	Address 2		City			Post Code	Province
Niger	3				City	PO Box			
Nigeria	6	Address 1	Address 2		City			Post Code	Province
Niue	3				City	PO Box			
Norfolk Island	6	Number/ Street	Address 2		City			Zip	State
Northern Mariana Islands	6	Number/ Street	Address 2		City			Zip	State
Norway	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Oman	4				City	PO Box		Post Code	Region
Pakistan	6	Number/ Street	Address 2	Address 3	City			Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Palau	6	Number/ Street	Address 2		City			Zip	State
Palestinian Authority	6	Address 1	Address 2		City			Post Code	Province
Panama	5	Address 1			City	Sorting Code			Province
Papua New Guinea	3				City				Province
Paraguay	4	Street/ Number	Address 2		City				
Peru	8	Street/ Number	Address 2		City	Sorting Code			Province
Philippines	7	Street/ Number	Address 2	District	City			Post Code	Province
Pitcairn Islands	1								
Poland	5	Street/ Number			City			Post Code	
Portugal	6	Street/ Number	Address 2	Floor	City			Post Code	
Puerto Rico	5	Address 1			City	URB		Post Code	
Qatar	6		Address 2		City	County		Post Code	PO Box
Reunion	5	Number/ Street	Address 2		City			Post Code	
Romania	5	Street/ Number	Address 2		City			Post Code	
Russian Federation	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Rwanda	3				City	PO Box			
Samoa	6	Number/ Street	Address 2		City			Zip	State

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
San Marino	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Sao Tome and Principe	5	Number/ Street	Address 2	Floor	City				
Saudi Arabia	5	Number/ Street	Address 2		City			Post Code	
Senegal	3	Street/ Number			City				
Serbia	6	Address 1	Address 2		City			Post Code	Province
Seychelles	4				City	PO Box			Island
Sierra Leone	5	Number/ Street	Address 2	Floor	City				
Singapore	5	Street/ Number	Address 2		City			Post Code	
Sint Maarten	5	Address 1	Address 2		City				Island
Slovakia	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Slovenia	5	Street/ Number	Address 2		City			Post Code	
Solomon Islands	5				City	PO Box		Island Code	Island
Somalia	6	Address 1	Address 2		City			Post Code	Province
South Africa	5	Number/ Street	Address 2		City			Post Code	
South Georgia/South Sandwich	6	Address 1	Address 2		City			Post Code	Province
South Sudan	4	Number/ Street			City	PO Box		Post Code	
Spain	7	Street/ Number	Address 2	Floor	City			Post Code	Province

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
Sri Lanka	5	Number/ Street	Address 2		City			Post Code	
St. Barts	6	Number/ Street	Address 2		City	CEDEX Code		Post Code	
St. Helena	6	Address 1	Address 2		City			Post Code	Province
St. Kitts and Nevis	5	Address 1	Address 2		City				Island
St. Lucia	5	Number/ Street	Address 2	Floor	City				
St. Martin	6	Number/ Street	Address 2		City	CEDEX Code		Post Code	
St. Pierre and Miquelon	5	Number/ Street	Address 2		City			Post Code	
St. Vincent and the Grenadines	5	Number/ Street	Address 2	Floor	City				
Sudan	4				City	PO Box		Post Code	
Suriname	3	Street/ Number			City				
Svalbard and Jan Mayen Islands	6	Address 1	Address 2		City			Post Code	Province
Swaziland	4				City	PO Box		Post Code	
Sweden	5	Street/ Number	Address 2		City			Post Code	
Switzerland	5	Street/ Number	Address 2		City			Post Code	
Syrian Arab Republic	3	Street/ Number			City				
Taiwan	5	Number/ Street	Address 2		City			Post Code	
Tajikistan	5	Street/	Address		City			Post	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR 3	CITY	COUNTY	STATE	ZIP	PROVINCE
		Number	2					Code	
Tanzania, United Republic of	3				City	PO Box			
Thailand	7	Address 1	Address 2	Address 3	City			Post Code	Province
Togo	3				City	PO Box			
Tokelau	6	Address 1	Address 2		City			Post Code	Province
Tonga	4				City	PO Box			Island
Trinidad and Tobago	5	Number/ Street	Address 2	Floor	City				
Tunisia	5	Street/ Number	Address 2		City			Post Code	
Turkey	5	Street/ Number	Address 2		City			Post Code	Region
Turkmenistan	4	Number/ Street			City			Post Code	
Turks and Caicos Islands	6	Address 1	Address 2		City			Post Code	Province
Tuvalu	4				City	PO Box			Island
Uganda	3				City	PO Box			
Ukraine	5	Address 1	Address 2		City			Post Code	
Union of the Comoros	3				City	PO Box			
United Arab Emirates	6		Address 2		City	PO Box		Post Code	Emirate
United Kingdom	7	Number/ Street	Address 2	Address 3	City	County		Post Code	
US Minor Outlying	6	Address 1	Address 2		City			Post Code	Province

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Islands									
Uruguay	5	Number/ Street	Address 2		City			Post Code	
Uzbekistan	6	Address 1	Address 2		City			Post Code	Oblast
Vanuatu	3				City	PO Box			
Venezuela	7	Street/ Number	Address 2	Floor	City			Post Code	Province
Vietnam	5	Number/ Street	Address 2		City			Post Code	
Virgin Islands (British)	6	Address 1	Address 2		City			Post Code	Province
Virgin Islands (U.S.)	6	Number/ Street	Address 2		City			Zip	State
Wallis and Futuna Islands	6	Address 1	Address 2		City			Post Code	Province
Western Sahara	5	Number/ Street	Address 2		City			Post Code	
Yemen	3	Street/ Number			City				
Zambia	5	Number/ Street	Address 2		City			Post Code	
Zimbabwe	5	Number/ Street	Address 2	Floor	City				

Valid State Abbreviations for USA

This table shows the picklist values for US states.

Abbreviations	Complete Names
AK	Alaska

Abbreviations	Complete Names
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida
GA	Georgia
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MI	Michigan
MN	Minnesota
MO	Missouri
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska

Abbreviations	Complete Names
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming

Valid Territory Abbreviations for USA

This table shows the picklist values for US territories.

Abbreviations	Complete Names
AS	American Samoa
FM	Federated States of Micronesia

Abbreviations	Complete Names
GU	Guam
MH	Marshall Islands
MP	Northern Mariana Islands
PW	Palau
UM	US Minor Outlying Islands
VI	US Virgin Islands

Valid Mailing Codes for USA

This table shows the three, official state-codes for U.S. military mail recipients.

Abbreviations	Description
AE (ZIP codes 09xxx)	Armed Forces Europe. This term includes Canada, Middle East, and Africa.
AK (ZIP codes 962xx - 966xx)	Armed Forces Pacific.
AA (ZIP codes 340xx)	Armed Forces Americas. This term includes Central and South America.

Valid Province/Territory Abbreviations for Canada

This table shows the official abbreviations for Canadian provinces (text fields).

Abbreviations	Complete Names
AB	Alberta
BC	British Columbia
MB	Manitoba
NB	New Brunswick
NL	Newfoundland and Labrador
NS	Nova Scotia
NT	Northwest Territories

Abbreviations	Complete Names
NU	Nunavut
ON	Ontario
PE	Prince Edward Island
QC	Quebec
SK	Saskatchewan
YT	Yukon

About Record Duplicates and External IDs

When you import records, you can choose one of the following options to handle duplicate records:

- By not importing the duplicate records
- By overwriting the existing records

  NOTE: The overwriting option is not available when you import Appointment User, Task User, or Notes. New records are always created for these record types.

- By creating additional records for the duplicates (Contacts, Leads, Appointments and Tasks only)

If you choose to overwrite existing records when you import your data, Oracle CRM On Demand checks whether the record in your import file is a duplicate of an existing record in Oracle CRM On Demand by checking the values in the fields that are used to check for duplicate records. If your record is a duplicate, Oracle CRM On Demand updates the fields on the existing record in Oracle CRM On Demand with the values from the record that you import, with the exception of the fields that are used to check for duplicate records.

On many record types, you can use either the External ID field or a predefined set of fields to check if the record in your import file is a duplicate of an existing record in Oracle CRM On Demand. If you use the External ID as the field to check for duplicate records, then when a duplicate record is found, all of the fields on the record in Oracle CRM On Demand are updated, with the exception of the External ID field. Similarly, if you use the predefined set of fields to check for duplicate records, all fields other than the duplicate-checking fields are updated on the record in Oracle CRM On Demand.

If you use the predefined set of fields to check whether the record in your import file is a duplicate of an existing record, then Oracle CRM On Demand checks the value in all of the predefined fields to determine whether the record is a duplicate. If the values in all of the predefined fields in the CSV file exactly match the values in all of the corresponding fields on an existing record, then the record is a duplicate. For example, assume that you import a contact record, and the values in the First Name, Last Name, Work Phone #, and Email fields match the values in an existing record. The record you are importing is then considered a duplicate. However, if the values in the First Name, Last Name, and Email fields match the values in an existing record, but the Work Phone # field is blank in your CSV file and is not blank in the existing record, then the record in the CSV file is not considered a duplicate.

For example, on the Account record type, you can use the External ID field, or a combination of the Account Name and Location fields to check for duplicate records. If the record in your file is a duplicate record, the existing record in Oracle CRM On Demand is updated with the data from your import file as follows:

- If you used the External ID field to check for duplicates, all fields other than the External ID field are updated on the record in Oracle CRM On Demand.
- If you used the Account Name and Location fields to check for duplicate records, all fields other than the Account Name and Location fields are updated on the record in Oracle CRM On Demand.

To update records

1. Set up your import CSV file with a column for the External IDs, or for all of the duplicate checking fields for the record type.
2. Make sure that the External IDs for the duplicate checking field values are exactly the same as the values for the existing records. If you are using External IDs, each one must be unique in the system for the update to work.
3. Include at least all required fields in your import CSV file.
4. Select the Overwrite Existing Records option in Step 1 of the import assistant.
5. Make sure that you map the External ID field or all of the duplicate checking fields in the Field Mapping step of the import assistant.
6. Complete all of the import assistant steps to import the data.

When you use the import assistant to update records, only fields that you map in the Field Mapping step are overwritten. Therefore, if you have fields that do not need to be updated, and they are not required for duplicate checking, you do not have to map those fields.

If External IDs exist and you have mapped them during the import process, the application uses them to determine if a record is a duplicate. When importing other record types, you can use those External IDs as references so that the associations are carried over to Oracle CRM On Demand.

For example, if you have an account_id column in your account.csv file, you want to map it to the External Unique ID in Oracle CRM On Demand. When importing contacts, if your contacts.csv file contains a contact_id column (the unique ID for the contact) and an account_id column (a reference to the IDs in the account.csv file), you should map the contact_id to External Unique ID and account_id to Account External ID. During the import process, the application checks the account_id field in each contact record to determine the existing account and link the account to the contact.

If no External IDs exist or you do not map External IDs in your file to the External ID fields in the application, the application determines duplicates by comparing certain fields. The following table lists the fields that are used to determine record duplicates.

Records of This Type	Are Duplicates If These Fields Match
Account	■ Account Name and Location OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Account Address	Account, Address, and Address Type
Account Book	Account and Book
Account Contact	■ Account Name and Contact Full Name OR ■ Account External ID and Contact External ID (Created by another software system) OR ■ Account ID and Contact ID (Oracle CRM On Demand Internal ID)
Account Team	Account and User
Accreditation	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Accreditation Request	■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Address	■ Address Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Allocation	■ Product, Type, Owner, and Start Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Application	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Appointment	■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when appointments are created through the user interface.
Appointment Contact	■ Appointment External ID, Contact (Contact External ID or Contact Full Name)
Appointment User	■ Appointment External ID, User (User Sign In ID or User External ID)
Asset	■ External ID (Created by another software system)
Blocked Product	■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Book	■ Book Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Book User	■ Book ID, Book External ID, or Book Name if you are identifying existing books ■ User Sign In ID, User External ID, or User ID if you are identifying book users within the book
Broker Profile	■ Broker Profile Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Business Plan	■ Plan Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Campaign	■ Source Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Campaign Recipient	Campaign (Campaign External ID or Campaign ID), Contact (Contact Full Name or Contact External ID), Source Code **NOTE:** You must provide either Contact Full Name or Contact External ID, but not both.
Certification	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Certification Request	■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Claim	■ Claim Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Contact	■ First Name, Last Name, Work Phone No. and Email OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when contacts are created through the user interface.
Contact Address	Contact, Address, and Address Type
Contact Book	Contact and Book
Contact State Licence	■ Licence Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Contact Team	Contact (Contact Name or Contact External ID) and User (User ID)
Course	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Course Enrolment	■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Coverage	■ Coverage Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Custom Objects 01, 02, 03	External ID (Created by another software system) **NOTE:** Oracle CRM On Demand does not check for duplicate records when custom object records are created through the user interface.
Custom Objects 04 and higher	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when custom object records are created through the user interface.
Damage	■ Damage Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Dealer	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Deal Registration	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Event	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Exam	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Exam Registration	■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Account	■ Financial Account OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Account Holding	■ Financial Account Holdings Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Account Holder	■ Financial Account Holder Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Plan	■ Financial Plan Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Financial Product	■ Financial Product Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Transaction	■ Transaction ID OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
HCP Contact Allocation	■ Contact ID, Product ID, Allocation Type, and Start Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Insurance Property	■ Type OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Inventory Audit Report	■ Reported Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Inventory Period	■ Start Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Invitee	■ Event and Contact Name (Contact Full Name or Contact Full Name and Contact ID) OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Involved Party	■ Involved Party Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Lead	■ First Name, Last Name, Company, Primary Phone No. and Email OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when leads are created through the user interface.
MDF Request	■ Request Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Messaging Plan	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Messaging Plan Item	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Messaging Plan Item Relations	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Note	■ No duplicate checking (Always creates new records)
Objective	■ Objective Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Opportunity	■ Opportunity Name and Account (Account Name or Account External ID) OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Opportunity Contact Role	■ Opportunity Name and Contact Full Name
Opportunity Product Revenue	External ID (Created by another software system) **NOTE:** Oracle CRM On Demand does not check for duplicate records when opportunity product revenue records are created through the user interface.
Order	■ Order Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Order Item	■ Order Item Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Partner	■ Partner Name and Location OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Partner Programme	■ Partner Programme Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Plan Account	■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Plan Contact	■ Contact Full Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Plan Opportunity	■ Opportunity OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Policy	■ Policy Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Policy Holder	■ Policy Holder Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Portfolio	■ Account Number and Product OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Price List	■ Price List Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Price List Line Item	■ LineItem OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Product	■ Product Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Product Indication	■ Product Indication Name OR ■ Row ID (Oracle CRM On Demand internal ID)
Product Category	■ Category Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Disclaimer	■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Inventory	■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Lot	■ Lot # OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Request	■ Order Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Sample Request Item	■ Order Item Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Transaction	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Service Request	■ SR Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Social Profile	■ Author and Community OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Solution	■ Title OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Special Pricing Product	■ Item Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when special pricing product records are created through the user interface.
Special Pricing Request **NOTE:** In the import assistant, this record type is shown as SP Request.	■ Request Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Task	■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Task Contact	■ Task External ID, Contact (Contact External ID or Contact Full Name)
Task User	■ Task External ID, User (User Sign In ID or User External ID)
Transaction Item	■ Sample OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
User	■ User ID OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Vehicle	■ VIN OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Vehicle Contact	Vehicle and Contact

CAUTION: When updating files, it is recommended that you map either the External ID or the other set of fields for determining duplicates; if you map both of these, you risk overwriting fields used for duplicate checking that you might not want to overwrite. For example, if you map the External ID, Account Name and Location when updating account records, and a duplicate is found based on the External ID, the Account Name and Location overwrite the existing values in the database. If there are no duplicates found based on the External ID, the system checks for duplicates based on Account Name and Location, and if found, overwrites the External ID in the database.

Account Import and External ID Summary

When importing accounts, you specify how you want the application to handle duplicate records:

- Don't Import Duplicate Records

  If duplicates are found, the duplicate record is not imported.

- Overwrite Existing Records

  If duplicates are found, the existing record is updated. If more than one duplicate is found, then no records are inserted or updated.

After selecting the behaviour, you have the option of mapping fields, including these two external IDs available with account imports:

- **External Unique ID.** Refers to the external ID of the current record to be imported. The External Unique ID is directly involved in duplicate checking, as described in this section.
- **Parent Account External ID.** References the external ID of the parent record for the current record.

The behaviour surrounding each of these external IDs is independent of each other.

Scenarios for External Unique IDs

Scenario A - External Unique ID is not mapped

Duplicate checking is based on Account Name and Location. If a duplicate is found, the behaviour is determined by the selected duplicate checking option.

Scenario B - External Unique ID is mapped

Import first tries to find a duplicate record using the External Unique ID.

- Scenario B1 - Single Duplicate External ID Found

  Account Name and Location are checked for duplicates outside of the currently matched record, and if a duplicate is found, no records are updated or inserted.

  If the duplicate checking option is set to Overwrite Existing Records, then the record is updated (including Account Name and Location).

  If the duplicate checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- Scenario B2 - Multiple Duplicate External IDs Found

  No Records are inserted or updated.

- Scenario B3 - No Duplicate External ID Found

  Import now checks duplicates based on the Account Name and Location.

  - Scenario B3a - No Duplicate Account Name and Location Found.
    Record is inserted.
  - Scenario B3b - Single Duplicate Account Name and Location Found
    If the duplicate checking option is set to Overwrite Existing Records, the record is updated, *including the External Unique ID*. If the duplicate checking option is set to Don't Import Duplicate Records, no records are updated.
  - Scenario B3c - Multiple Duplicate Account Name and Locations Found
    No records are inserted or updated.

Scenario C - External Unique ID is not Mapped

The Account Name and Location are used to perform duplicate checking.

- Scenario C1 - Single Duplicate Account Name and Location found

  If the Duplicate Checking option is set to Overwrite Existing Records, then the record is updated.

  If the Duplicate Checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- Scenario C2 - Multiple Duplicate Account Name and Location found.

  No records are updated or inserted.

- Scenario C3 - No Duplicate Account Name and Location found

  Record is inserted.

Scenarios for Parent Account External IDs

The Parent Account External ID is only used to set the associated Parent Account Record. It has no impact on duplicate checking or updates.

Scenario A - Parent Account External ID is Mapped

Import uses the Parent Account External ID to determine the Parent Account *only*.

- Scenario A1- Multiple records match Parent Account External ID

  Parent Account is not set.

- Scenario A2 - Single Record matches Parent Account External ID

  Parent Account is set.

- Scenario A3 - No records match the Parent Account External ID

  Parent Account is not set.

Scenario B - Parent Account External ID is not Mapped

Import uses the Parent Account Name and Parent Account Location to determine the Parent Account.

- Scenario B1 - Multiple records match Parent Account Name and Parent Location.

  Parent Account is not set.

- Scenario B2 - Single Record matches Parent Account Name and Parent Location

  Parent Account is set.

- Scenario B3 - No records match the Parent Account Name and Parent Location

  Parent Account is not set.

Linking Records During Import

When you import records, you may want to link them to existing records in the database. For example, you might link a contact record (John Smith) to an account record (Smith Auto Repair).

A record must already exist in the database before you can link another record to it during import. Therefore, when you have more than one type of record to import, it is best to import them in the order in which they appear on the Import and Export Tools page. For example, import account records before you import contact records.

You can link records during import in one of two ways:

- by indicating the name of the linked record or
- by indicating its external ID code.

In either case, you must make sure that your import CSV file includes a column containing the data.

Using the Name to Link Records

To link records by indicating the name, include a column in your import file for the name of the linked record. For example, to import contact records that are linked to accounts:

- add an Account Name column to your import file
- fill in the name of the appropriate account for each contact record
- use the Import Assistant to map the Account Name column to the Account field in the contact record.

NOTE: If a contact record is imported with an associated account that does not yet exist in the database, one can be created during import. The system-created account record will use the contact's address for the account billing and shipping addresses. To enable this feature, select the Create Associated Record option in Step 1 of the Import Assistant.

Using the External ID to Link Records

You can import a unique identifier code into the External ID field for each record in the application. Then, you can use the External ID field to create links between records in subsequent imports.

For example, an exported CSV file of contact records identifies an associated account for each contact. Each account is represented by a numeric code, rather than by a name, in a column called Account Code. When importing these records, first import the account records, mapping the Account Code column in the CSV file to the External ID field in the application. Next, import the contact records, mapping the Account Code column in the CSV file to the Account External ID field in the Oracle CRM On Demand contact record to create a link between the contact and account records.

Data Checking Guidelines

Check the data in your CSV file before importing it into Oracle CRM On Demand:

1. Check the guidelines for the field type of the data. See Field Type Guidelines for Importing Data (on page 601).

2. Check the specific information pertaining to each record type you want to import. .

   The drop-down list in the Import and Export Tools page shows the recommended sequence for importing records. The record types in the list depend on the industry-specific solutions you have implemented, however, you must import the record types in the sequence shown in the list.

NOTE: The data checking guidelines use examples relevant to the installations of Oracle CRM On Demand in the U.S and Canada. Other country-specific installations might change the default lists of valid values, so that they differ from the information shown in this topic. For example, the list of valid state or province values will probably be different for installations outside the U.S and Canada. Also, valid values might be different, depending on the languages that are supported.

Oracle CRM On Demand determines the field order in the export CSV file, and can change at any time. Therefore, do not rely on the fields in the export CSV file to be in a specific order. Renaming the iTAG or field name values has no impact on the order of the fields in the export file. If you want more control of field order, consider using Oracle Web services.

Field Type Guidelines for Importing Data

Make sure that the data that you want to import meets the specifications for its field type. The field types described in this topic are as follows:

- Text
- Picklist
- Number
- Integer
- Currency
- Percent
- Check box

- Email
- Phone
- Date/Time
- Date

Text

Each text field in Oracle CRM On Demand has a maximum length. Excess characters are not imported. The Import Results email message warns you when this situation occurs.

TIP: Compare the length of the data you want to import against the allowed length. (Open the file in a spreadsheet application and use one of the spreadsheet functions to determine the longest value in a column.) When the data exceeds the limit, consider importing it into a custom field, splitting the data into two separate fields or abbreviating some data so that it fits within the target length.

Picklist

Picklist fields allow a user to select a value from a list of values for the field. During the import process, you can specify whether or not to add new picklist values from your CSV file to the application.

NOTE: If the user's language setting is the same as the company-level language setting, they will always see the picklist values option. If the user's language is different from the company's language setting, they won't see that option. For example, if the company language is French, a user with language set to French can see that option, but a user in the same company with language set to English does not see it.

If you choose not to add them, only picklist values that exactly match the values in the application are imported. (Values are case-sensitive.) The Import Results email message warns you when this situation occurs.

The company administrator can change the picklist values for fields except for a few specific fields (for the exceptions, see the guidelines for the record type that you want to import).

NOTE: If you select the option to add new picklist values when importing data, these new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during this time period.

To compare the data in your file to the valid values in the application

1. Open your file in a spreadsheet application.

   TIP: If you open the file in Microsoft Excel, you can use the AutoFilter feature to see which values appear for specific columns in your file.

2. Compare the values in your file against the valid values in Oracle CRM On Demand by doing one of the following:

   - If you are an administrator, click the Admin global link in the application and go to the Field Set-up page containing the field whose values you want to compare.
   - In Oracle CRM On Demand, click the appropriate tab and select a record. On the Edit page, click the drop-down list for the field that you want to check, and compare those values against your data.

TIP: If you decide to restrict the import data to *only* those values that match the existing ones, make sure every imported value matches an existing value. Case is taken into account when determining if there is a match. You can either change the data in the import file to match the valid values or add picklist values to the application (see Changing Picklist Values (on page 158)).

Number

Import data can be any number between -2,147,483,648 and 2,147,483,647. Commas in your import data are ignored. Digits after a decimal point are rounded to the nearest 100th.

During import, if a value with unexpected characters is found or the value exceeds the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Number fields are represented in a common format in the application (for example: 1,234).

Integer

Integers can be any whole numbers ranging in value from - 2147483648 to 2147483647.

Currency

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Import data can be preceded by a $ or other currency character. Negative numbers are valid.

During import, if a value with unexpected characters is found or the value contains too many digits, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Currency fields are represented in a common format in the application (for example: $1,000,000.00).

Percent

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Negative numbers are valid. Import data may be preceded or followed by a % character and any number of spaces between the number and the %. For example, all these valid values appear as 1,234.36% in the application:

1234.36
1,234.36
1234.35678
1234.36%
1,234.36 %

During import, if a value with unexpected characters is found or the value exceeds the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Percent fields are represented in a common format in the application (for example: 1,234.36% with commas and followed by a % sign).

Check box

A checkbox has only two settings: checked or unchecked. The following table shows you the values that you can use when importing data. These values are not case sensitive, so the application recognises “true” “t” and so on.

Checkbox is selected	Check box is blank (deselected)
1	0
Y	N
Yes	No
T	F
True	False
Checked	Unchecked

All other values in the import data result in an unchecked setting for the check box field in the application. The Import Results email message does *not* warn you when this situation occurs.

You must use your translated equivalents of the values in the tables if you are importing under a different language. However, the application will accept the values in the first two rows of the table, regardless of your language setting: Y, N, 1, 0.

TIP: Check for values that might be expected to result in the checked setting but that are not recognised as such during import. Convert those values to Y before importing.

During the import process, if a checkbox field for the record type being imported is not mapped to an import file field, its value is set to unchecked for each imported record.

Email

If the import data does not match a certain format, the data for the field is not imported. The following criteria are considered invalid:

- Email data ending or beginning with the at sign (@) or full stop (.). Both symbols must be surrounded by alphanumeric characters. For example, these values are not valid:
  a@.
  @a.
  @.a
  a@a.
  a@.a
  @a.a
- Empty string
- String too long
- No characters before the @ at sign, for example: @riqhtequip.co.uk
- No @ at sign, for example:isampleriqhtequip.co.uk
- No period (.), for example: isample@riqhtequipcouk
- No domain, for example: isample@

- No domain suffix such as co.uk, for example: isample@riqhtequip
- Multiple at signs (@), for example: isample@@riqhtequip.co.uk
- Consecutive full stops (.), for example: isample@riqhtequip..co.uk
- Spaces in the string, for example: isa mple@riqhtequip
- Characters other than the following in the local part of an email address:
  - Upper-case and lower-case letters (case insensitive)
  - The digits 0 through 9
  - The characters ! # $ % & ' * + - / = ? ^ _ ` { | } ~ .
- Any special characters in the domain name of an email address. Special characters include: ! # $ % & ' * + - / = ? ^ _ ` { | } ~ ()

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

, ( ) [ ] : ; " < >

The Import Results email message warns you when data for the field is not imported as a result of incorrect formatting.

Phone

The same format rules for entering phone number data apply to importing phone number data. Data in a recognised phone number format is converted to a consistent format in the application.

The field length rules that apply to text fields also apply to phone number fields. In particular, if the import data exceeds the length of the application field, the excess characters are *not* imported. The Import Results email message warns you when this situation occurs.

Date/Time

Import data can contain several different date/time representations. As part of the importing process, you select the format used in your CSV file.

Regardless of their imported format, Date/Time fields are represented in a common format in the application (for example: 19/01/1964 12:15 PM). The format used to display data is determined by the Locale setting of the user, which is shown on the Personal Detail page.

The date/time values are assumed to be correct for the time zone of the person performing the import, as specified on their Personal Detail page in the application. After the dates/times are imported, however, users viewing the data from a different time zone see the date/time adjusted for their time zone.

TIP: Make sure that the time zone of the person performing the import matches the time zone of the date/times in the import data file. For instance, if the date/times specified in the import data are relevant to Pacific Standard Time and a user in the Eastern Standard Time zone imports that data, all times will be incorrect by three hours. The solution is for the user to temporarily set the time zone to Pacific Standard Time

when performing the import, so the times are imported correctly. Be sure that you know what time zone the date/times in your import file are relative to before you start an import. Note that it is very common for date/times in CSV data files to be in Greenwich Mean Time (GMT) format, so make sure that you check this item prior to import.

- About Dates in Date/Time Field Type

  When running the Import Assistant, you are required to specify whether import data has dates with month (MM) first or day (DD) first. If you specify month first, the following formats are supported:

  MM/DD/YY
  MM/DD/YYYY
  MM/DD (year defaults to current year)

  If you specify day first, the following formats are supported:

  DD/MM/YY
  DD/MM/YYYY
  DD/MM (year defaults to current year)

  You may also specify that the import data format is: YYYY-MM-DD.

  For all these formats, MM and DD can contain a leading 0 when the date or month is a single digit, but the 0 is not required.

  NOTE: Dates in the format DD-MON-YY or DD-MON-YYYY are *not* currently supported.

- About Times in Date/Time Field Type

  A time can be specified in the import data. To specify a time with a date, include a space after the date and then the time. If there is no time specified with a date, the time is set to 00:00:00 (midnight). The following time formats are supported:

  HH24:MI:SS
  HH:MI:SS AM
  (where HH24 represents 24-hour time and AM represents either AM or PM if HH is a 12-hour value)

  MI or SS can be omitted; and if omitted, they are set to 00 during import. HH, MI and SS can contain a leading 0 when the value is a single digit but the 0 is not required.

  NOTE: Regardless of the date/time format option you select during import, the import process accepts times in 24-hour format. For example, if you select the default Canada format, which is hh:mm:ss AM/PM and your file shows a time of 15:00:00, the data is properly imported as 3:00:00 PM.

Date

Date type fields in the application allow entry and display of a date only; they do not allow time to be specified. When importing into one of these fields, valid import data formats are the same as for Date/Time type fields. However, time should *not* be specified in the import data. If a time is specified, it is ignored during the import.

Regardless of their imported format, Date fields are represented in a common format in the application (for example: 12/18/2003).

About Required Fields

If a field has been designated as required (either by default or by the administrator), the entire record is rejected if you don't map the required fields to columns in your CSV file. The Import Results email message warns you when this situation occurs.

TIP: Review the fields for the record type you are importing to determine which fields are required fields. Make sure that the import data contains a valid value for all those fields.

About Read-Only Fields

Read-only fields follow this behaviour during an import:

- If a read-only field has a picklist, you must match the picklist values exactly to import them.
- If you have read-only access to a field, you cannot import data into that field.

Preparing for Data Importing

Before you start importing data in Oracle CRM On Demand, you must first determine what import method you want to use. For more information on selecting the appropriate import method, see Import and Export Tools (on page 558). For example, the Oracle Data Loader On Demand Utility supports only specific record types. For more information, see Oracle Data Loader On Demand Guide. It is also recommended that you read the following topic before you perform an import: Before You Import Data.

You might need to edit data in your CSV file or customise Oracle CRM On Demand to make sure all your file data is imported. To determine if that is necessary, perform the following tasks before you begin importing:

- Determine the record types that you want to import.

  You might want to import different record types, such as leads, accounts, contacts and notes. You must import one record type at a time and you should follow the recommended sequence for importing.

  For example, if you have a file that contains a list of your contacts and another file with your accounts, you should import the accounts first and then the contacts in order to maintain the relationships set up between those record types.

  The sequence order is shown on the user interface itself on the Import and Export Tools page.

- Check the data in your file to make sure it:

  - Has consistent capitalisation, abbreviations, and spelling

    Text values are imported exactly as they appear in your CSV file. Therefore, any differences in capitalisation can result in additional records being created, when that is not desired. For example, all of the following values for Account Names would result in new records: ABC, abc, A.B.C.

    Additionally, since two account records are recognised as identical if the account name *and* location are identical, addresses must be spelled, capitalised, and abbreviated identically to prevent additional records from being created. For example, all of the following records would **not** be considered identical:

    ABC, 111 10th Avenue

ABC, 111 10th Ave.

ABC, 111 10th Ave

ABC, 111 Tenth Avenue

- Does not exceed the maximum length allowed
- Complies with the formatting requirements for that field

For more information, see Data Checking Guidelines (on page 601).

- Check the application for required fields for the record type that you want to import.

  You must map data in your CSV file to all required fields. If you don't, the record is rejected. To determine which fields are required, see the Edit page for the record type that you want to import. Required fields are shown in red text. Also, your administrator can configure a field so that it is conditionally required, that is, the field is not required by default, but becomes required if the data in other fields on the record meets certain criteria. If a field becomes required as a result of the condition defined for the field being true, and if your import file does not include a value for the conditionally required field, then the record is rejected.

- Add fields to the application if you want to import data that doesn't map to the default fields in the application.

  During the import process, you must match every field in your file to an existing field in the application to capture that data. If your role includes the Customise Application privilege, you can create new (custom) fields in Oracle CRM On Demand to map to the existing fields. For instructions, see Creating and Editing Fields (on page 125).

- Set up picklist values, if necessary.

  During the import process, you can specify how you want the application to handle picklist values in your CSV file that don't match existing picklist values in the application:

  - Add them to the application as new values

    NOTE: To see the picklist value changes in the application, you might need to sign out and sign back in again.

  - Don't add them (only capture the values that match and leave the others blank)

  If you want to use the picklist values that exist in the application and import only the data that matches them, verify that the picklist values match exactly, including their spelling and capitalisation (values are case-sensitive).

  Some picklist values cannot be changed, and a few don't follow this behaviour. See Data Checking Guidelines (on page 601) and review the guidelines for the record type that you want to import.

- Select the correct time format.

  If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows:

  - If the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM.
  - If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

Related Topics

See the following topics for related information:

- Changing Picklist Values (on page 158)
- Import and Export Tools (on page 558)

For more information about preparing data importing, see 1800338.1 (Article ID) on My Oracle Support.

Account Address Fields: Import Preparation

The following table contains specific information about setting up your records before importing account addresses into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. You can import Account Address fields in Oracle CRM On Demand only if shared addresses are set up for your company. For more information on shared addresses, see Managing Addresses.

Default Account Address Field Name	Data Type	Maximum Length	Comments
Row ID	ID	15	None.
Account ID	ID	15	None.
Account External ID	Text	30	None.
Address ID	ID	15	None.
Address External ID	Text	30	None.
Address Type	Picklist	30	The following default address types are available: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic.
Billing	Checkbox	1	If the Billing field has a value of Y, then the address is a billing address. The values for this field are Y and N.
Shipping	Checkbox	1	If the Shipping field has a value of Y, then the address is a shipping address. The values for this field are Y and N.

Account Book Fields: Import Preparation

The following table contains information about setting up your CSV file before importing account books into Oracle CRM On Demand.

NOTE: To import account book or contact book records, your role must include the Manage Future Books privilege.

The information in this topic supplements the guidelines in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. For more information on time-based book assignments, see About Time-Based Book Assignments (on page 357).

Default Book Accounts Field Name	Data Type	Maximum Length	Comments
Book	String	150	None
Book Id	String	15	None
Book External ID	String	30	None
Account: Id	String	15	Account identifier.
Account	String	100	None
Account Location	String	50	None
Account External ID	String	30	None
Start Date	Date	None	The date on which the record activation must take place.
End Date	Date	None	The date on which the record activation must end.
Future Primary Flag	String	1	If the future primary flag has a value of Y, then the book for the current record is set to primary for the data object when the book is activated. This is based on the Start Date field. The values for this field are: Y and N.

Account Contact Fields: Import Preparation

The following table contains specific information about setting up your records before importing account contacts into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Contacts Field Name	Data Type	Maximum Length	Comments
Account ID	ID	15	None
Account External ID	Text	30	None
Account Name	Varchar	100	None
Contact External ID	Text	30	None
Contact Name	Text	255	The contact's full name
Contact ID	ID	15	None
Currency	Varchar	20	None
Exchange Date	Date	Not applicable	None

Account Competitor Fields: Import Preparation

The following table contains specific information about setting up your records before importing account competitors into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Competitor Field Name	Data Type	Maximum Length	Comments
Account ID	ID	15	None
Competitor ID	ID	15	None

Default Account Competitor Field Name	Data Type	Maximum Length	Comments
This Account	Text	100	Indicates the parent account name
Account Competitor	Text	100	Indicates the name of the competitor
Account External Unique ID	Text	30	None
Competitor External ID	Text	30	None
ID	ID	15	Indicates the row ID of the account competitor
Role	Picklist	30	None
Reverse Role	Picklist	30	None
Start Date	Date	None	None
End Date	Date	None	None
Status	Text	30	None
Strengths	Note	1999	None
Weakness	Note	1999	None
Contact ID	ID	15	None
Primary Contact	Text	100	None
Comments	Note	1999	None

Account Event Fields: Import Preparation

The following table contains specific information about setting up your records before importing account events into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Event Field Name	Data Type	Maximum Length	Comments

Default Account Event Field Name	Data Type	Maximum Length	Comments
Account	Text	50	None
Account ID	ID	15	None
Account External Unique ID	ID	15	External unique ID of the account.
Event	Text	50	Name of the event.
Event ID	ID	15	None
Event External System ID	ID	15	External system ID of event.
Row ID	ID	15	None

Account Fields: Import Preparation

The following table contains specific information about setting up your records before importing accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Account Name	Text	100	This field is required by default. Therefore, make sure that all records have values in this field before importing.
Account Type	Picklist	30	Default valid values: Competitor, Customer, Partner and Prospect
Annual Revenues	Currency	15	None
Billing Address	Picklist	100	The value in this field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address

Default Account Field Name	Data Type	Maximum Length	Comments
			record.
Billing Address 2, 3	Text	100 each	This field is not available if shared addresses are set up for your company.
Billing Address1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Billing City	Text	50	This field is not available if shared addresses are set up for your company.
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.K. is UK. The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Invoicing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonial/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Billing Province	Text	50	If your file contains non-UK addresses, map the following address items (or other equivalents of UK counties) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate and Oblast (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.

Default Account Field Name	Data Type	Maximum Length	Comments
Billing US State	Picklist	2	Default valid values: Standard three-letter abbreviations for all the UK counties/regions (all capital letters). The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before importing. This field is not available if shared addresses are set up for your company.
Invoicing Zip Code	Text	30	This field is not available if shared addresses are set up for your company.
Bill To Address External ID	Text	30	If shared addresses are enabled for your company, the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated Address record.
Call Frequency	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters and the remaining characters are added to linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
External Unique ID	Text	30	None
Furigana Name	Text	100	The Furigana equivalent of the Kanji (for Japanese only).
HIN	Text		Health Industry Number. Specific to Oracle CRM On Demand Life Sciences Edition.

Default Account Field Name	Data Type	Maximum Length	Comments
Industry	Picklist	50	The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before importing. Alternatively, your company's Oracle CRM On Demand administrator can create a custom Account field that contains the valid values that you expect in your import data. This would allow you to import your data into that custom field instead of this field. Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services and Telecommunications
Influence Type	Text	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Integration ID	Text	30	None
Last Call Date	UTC Date Time	7	Specific to Oracle CRM On Demand Life Sciences Edition.
Location	Text	50	In most cases, this field is used to determine record duplication. For more information, see About Record Duplicates and External IDs (on page 582). For example, to distinguish between headquarters and a branch office of Account XYZ, the application checks both the Account Name and the Location to determine if the record is a duplicate.
Main Fax #	Phone	40	None
Main Phone #	Phone	40	None
Market Potential	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Segment	Text	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this text.
Market Share	Number	22	Specific to Oracle CRM On Demand Life Sciences Edition.
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Number of Employees	Integer	Not	None

Default Account Field Name	Data Type	Maximum Length	Comments
		applicable	
Number of Physicians	Number	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Parent Account	Text	100	Must be a valid Account name.
Parent Account External ID	Text	30	None
Parent Account Location	Text	50	None
Partner	Check box	Not applicable	Indication that the account is a partner.
Picklist Value Group	Text	50	None
Priority	Picklist	30	Default valid values: Low, Medium and High
Public Company	Check box	Not applicable	This field should be set to the Checked status if this is a public (as opposed to a privately-owned) company.
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images.
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.

Default Account Field Name	Data Type	Maximum Length	Comments
Reassign Account	Check box	Not applicable	Indication that the account should be reassigned. When imported, this triggers automatic assignment rules for this account record, if your company administrator or manager has set up this feature.
Reference	Check box	Not applicable	This field should be set to the checked status if there is an agreement for this account to be given out as a reference to prospects.
Reference as of	Date	Not applicable	None
Region	Picklist	25	Default valid values: Northern, Southern, Midlands
Route	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit the picklist.
Shipping Address	Picklist	100	This field is only available if shared addresses are set up for your company. This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated Address record.
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Shipping Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.

Default Account Field Name	Data Type	Maximum Length	Comments
Shipping Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.K. is UK. The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Shipping PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonial/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Shipping Province	Text	50	If your file contains non-UK addresses, map the following address items (or other equivalents of UK counties) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate and Oblast (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Shipping US State	Picklist	2	Default valid values: Standard three-letter abbreviations for all the UK counties/regions (all capital letters). The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before importing. This field is not available if shared addresses are set up for your company.
Shipping Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Ship To Address External ID	Text	30	If shared addresses are enabled for your company, the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is enabled, this

Default Account Field Name	Data Type	Maximum Length	Comments
			value must match an existing validated Address record.
Source Campaign	Picklist	30	The campaign that generated the account.
Status	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit the picklist.
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images.
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Territory	Text	255	None
Web Site	Text	100	No format checking (except length checking) is performed on the imported data for this field.
YTD Revenue	Number	22	Specific to Oracle CRM On Demand Life Sciences Edition.

Account Partners Fields: Import Preparation

The following table contains specific information about setting up your records before importing account partners into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Partner Field Name	Data Type	Maximum Length	Comments
Account Id	ID	15	None.
Partner Id	ID	15	None.
Parent Account Name	Text	100	None.

Default Account Partner Field Name	Data Type	Maximum Length	Comments
Account External Unique Id	Text	30	None.
Partner External Id	Text	30	None.
Id	ID	15	None.
Role	Picklist	30	None.
Reverse Role	Picklist	30	None.
Start Date	Date	None	None.
End Date	Date	None	None.
Status	Text	30	None.
Strengths	Note	1999	None.
Weakness	Note	1999	None.
Contact Id	Id	15	None.
Primary Contact	Text	100	None.
Comments	Note	1999	None.

Account Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing account teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Team Field Name	Field Type	Maximum Length	Comments

Account Access	Picklist	15	Default valid values: Full, Read-only, Edit, Owner. You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Account Location	Text	50	None
Account Name	Text	100	None
Contact Access	Picklist	15	Default valid values: Read-only, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Opportunity Access	Picklist	15	Default valid values: Read-only, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Team Role	Picklist	30	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	None
Account External ID	Text	30	None
User External ID	Text	30	None

Accreditation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing accreditation data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Accreditation Field Name	Field Type	Maximum Length	Comments
Accreditation Fee	Currency	22	None.
Accreditation ID	Text	50	It is recommended that the internal identifier for the accreditation be unique.

Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	50	None.
Contact	Picklist	15	Use this field if the accreditation contact is already present in Oracle CRM On Demand.
Currency	Picklist	15	None
Description	Text	250	None.
Email	Text	40	The email address for the accreditation contact.
Exchange Date	Date	Not applicable	None
First Name	Text	50	Use this field to enter the accreditation contact's first name only if the contact is not present in Oracle CRM On Demand.
Last Name	Text	50	Use this field to enter the accreditation contact's last name only if the contact is not present in Oracle CRM On Demand.
Name	Text	50	It is recommended that the accreditation name be unique.
Objective	Picklist	50	None.
Owner	Picklist	15	None.
Payment Options	Picklist	30	The default valid values are as follows: Check, Credit Card, Cash, and Earned Funds.
Phone	Phone	50	The phone number for the accreditation contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Renewable	Check box	1	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Validity (Months)	Number	22	None.
Website	Text	100	The URL for a page that contains additional

			accreditation information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Accreditation Fields

Accreditation Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing request data for course accreditation into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Accreditation Request Field Name	Field Type	Maximum Length	Comments
Accreditation Date	Date	7	None.
Accreditation Name	Picklist	15	None.
Accreditation Number	Text	50	Accreditation numbers are usually unique.
Accreditation Status	Picklist	30	The default valid values are as follows: Requested, Granted, and Denied.
Description	Text	250	None.
Expiration Date	Date	7	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Partner Name	Picklist	15	None.
Plan	Picklist	15	None.
Renewable	Check box	1	None.
Request Date	Date	7	This field displays the current date during record creation by default, but you can modify it during and after record creation.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Address Fields: Import Preparation

The following table contains information about setting up your records before importing addresses into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Address Field Name	Data Type	Maximum Length	Comments
Address Name	Text	100	This field is required and must be unique.
Country	Text	30	None
Address 1	Text	200	None
Address 2	Text	100	None
Address 3	Text	100	None
State	Text	30	None
City	Text	50	None
Province	Text	50	None
Postal Code	Text	30	None
Description	Text	100	None
Comments	Text	1999	None
Latitude	Number	22	You can use this field value for mobile applications, such as Oracle CRM On Demand Disconnected Mobile Sales and Oracle CRM On Demand Connected Mobile Sales, that support geocoding features.

Default Address Field Name	Data Type	Maximum Length	Comments
Longitude	Number	22	You can use this field value for mobile applications, such as Oracle CRM On Demand Disconnected Mobile Sales and Oracle CRM On Demand Connected Mobile Sales, that support geocoding features.

Allocation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing allocations into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Allocation Field Name	Data Type	Maximum Length	Comments
Allocation Type	Text	30	None
Allocation Qty	Number	22	The quantity of the product that is allocated to the sales representative from the administrator.
Distributed Qty	Number	22	The quantity of the product that the sales representative dropped off within the allocation period.
End Date	Date/Time	7	The last date on which the product can be disbursed.
Max Qty	Number	22	The quantity of the product that the sales representative can distribute at a given time to a customer.
Order By	Number	22	The order in which the user can see the products in the list.
Remaining Qty	Number	22	The quantity of the product that remains available for the sales representative to drop off within the allocation period.
Sample	Text	15	The product name associated with the allocation.

Default Allocation Field Name	Data Type	Maximum Length	Comments
Start Date	Date/Time	7	The date on which the distribution starts.
Stop Sampling Flag	Boolean	1	When this field is selected, it indicates that the product can no longer be disbursed.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Application Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing application records into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Application Field Name	Data Type	Maximum Length	Comments
Address Address 1	Varchar	200	The number and street of the company's address from whom the application is made.
Address Address 2	Varchar	100	None
Address Address 3	Varchar	100	None
Address City	Varchar	50	None
Address Country	Varchar	30	None
Address PO Box/Sorting Code	Varchar	200	None
Address Province	Varchar	50	None
Address US State	Varchar	10	None
Address Zip/Post Code	Varchar	30	None

Default Application Field Name	Data Type	Maximum Length	Comments
Annual Revenue	Number	22	The total annual revenue for the company.
Approval Status	Varchar	30	The current approval status for the application.
Approved Date	Date	7	The date and time that the application was approved.
Campaign	Varchar	15	This is the name of the campaign that attracted the partner to make the partner application.
Cellular Phone #	Varchar	40	The submitter's cellular phone number.
Currency	Picklist	15	None
Current Approver	Varchar	15	The name of the current approver.
Email Address	Varchar	100	The submitter's email address.
Exchange Date	Date	Not applicable	None
Existing Partnerships	Varchar		The list of existing partnerships.
Expected Partnership Benefits	Varchar	500	The list of expected benefits from this partnership.
First Name	Varchar	50	The submitter's first name.
Industry	Varchar	50	The industry in which the company competes.
Job Title	Varchar	75	The submitter's job title.
Last Name	Varchar	50	The submitter's last name.
Location	Varchar	50	The location of the company.
Main Fax #	Varchar	40	The primary fax number for the company.
Main Phone #	Varchar	40	The primary phone number used to reach the company.
Name	Varchar	50	The name of the company.
Number of Employees	Number	22	The total number of employees in the company.
Owner	Varchar	15	The owner of the record.

Default Application Field Name	Data Type	Maximum Length	Comments
Partner	Varchar	15	The partner who is associated with this application.
Partner Program	Varchar	15	The name of the partner program associated with the application.
Partner Type	Varchar	30	The type of partner for which the application is being submitted.
Programme Level	Varchar	30	The level of the partner program associated with the application.
Reject Reason	Varchar	30	The reason why the application was rejected.
Source	Varchar	30	The source from which this application comes, for example, Web site, direct mail, email, and so on.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	Date	7	The submission date and time of the application.
Web Site	Varchar	100	The URL address for the company.
Work Fax #	Varchar	40	The submitter's work fax number.
Work Phone #	Varchar	40	The submitter's work phone number.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Appointment Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and an appointment into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Appointment Contact Field Name	Data Type	Maximum Length	Comments
Contact Full Name	Text	255	None
Contact External ID	Text	30	None
Appointment External ID	Text	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Appointment User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and an appointment into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Appointment User Field Name	Data Type	Maximum Length	Comments
User ID	Text	30	None
Appointment External ID	Text	30	None
User External ID	Text	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Appointment, Task and Call Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing appointments and tasks into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Select the correct time format. If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows: if the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM. If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

Default Appointment, Task and Call Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Account Location	Text	50	None
Activity	Text	100	None
Activity Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Appointment Reminder	Picklist	30	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Campaign	Text	50	None
Campaign External ID	Text	30	None
Comments	Note	250	None
Contact	Text	255	None
Contact External ID	Text	30	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The

Default Appointment, Task and Call Field Name	Data Type	Maximum Length	Comments
			remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Due Date	Date	32	None. This field is available for tasks. It is a required field by default.
End Time	Date/Time	32	None. This field is available for appointments. It is a required field by default.
External Unique ID	Text	30	None
Event	Picklist	50	Specific to Oracle CRM On Demand Life Sciences Edition.
Fund Request	Picklist	30	Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition. Read-only.
Integration ID	Text	30	None
Lead	Text	255	None
Lead External ID	Text	30	None
Location	Text	100	For appointments only.
Opportunity	Text	100	None
Opportunity External ID	Text	30	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Priority	Picklist	30	This field is required by default. Default

Default Appointment, Task and Call Field Name	Data Type	Maximum Length	Comments
			valid values: 1-High, 2-Medium, 3-Low
Private	Check box	Not applicable	None
Service Request	Text	64	None
Service Request External ID	Text	30	None
Start Time	Date/Time	32	None. This field is available for appointments. It is a required field by default.
Status	Picklist	30	The default valid values are: Completed, Deferred, In Progress, Waiting For Someone Else, Not Started
Subject	Text	150	Available for tasks and appointments. It is a required field by default.
Task Currency	Text	15	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Task Reminder	Date/Time	32	None.
Type	Picklist	30	This field is available for tasks and appointments. The default valid values are: Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Other, Personal, Presentation, To Do

Related Topics

See the following topics for related information:

- Activity Fields
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Asset Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing assets into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Asset Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Asset Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Contract	Text	30	None
Customer Contact	Text	255	None
Description	Text	250	None
Expiration Date	Date	7	None
External Unique ID	Text	30	None
Install Date	Date	7	This field is automatically populated with the current date when you import assets into Oracle CRM On Demand.
Integration ID	Text	30	None
Notify Date	Date	7	Specific to Oracle CRM On Demand High Tech Edition.
Operating Status	Text	30	None
Product External ID	Text	30	None
Product Name	Text	100	Required field by default.
Purchase Date	Date	7	None
Purchase Price	Currency	15	None
Quantity	Number	15	None

Default Asset Field Name	Data Type	Maximum Length	Comments
Serial #	Text	100	None
Ship Date	Date	7	None
Warranty	Text	30	None

Related Topics

See the following topics for related information:

- Tracking Assets
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Blocked Product Fields: Import Preparation

The following table contains specific information about setting up your records before importing blocked product records into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Blocked Product Field Name	Data Type	Maximum Length	Comments
Contact	Text	15	None
Currency	Picklist	15	None
Description	Text	250	None
Exchange Date	Date	Not applicable	None
External System Id	Text	50	None
Id	Text	15	None
Indexed Checkbox	Boolean	1	None
Indexed Currency	Currency	22	None
Indexed Date	Date/Time	32	None
Indexed Number	Number	22	None

Default Blocked Product Field Name	Data Type	Maximum Length	Comments
Indexed Picklist 1	Picklist	30	None
Indexed Picklist 2	Picklist	30	None
Indexed Picklist 3	Picklist	30	None
Indexed Picklist 4	Picklist	30	None
Indexed Picklist 5	Picklist	30	None
Owner	Text	15	None
Product	Text	100	None
Contact: External Unique Id	Text	50	None
Owner: External Unique Id	Text	50	None
Product: External Unique Id	Text	50	None

Book User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing book users into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. For more information on using books in Oracle CRM On Demand, see Book Management (on page 338).

Default Book Users Field Name	Data Type	Maximum Length	Comments
Access Profile	String	100	None
Book User Role	String	30	None
Users	String	50	This field is the value for the user alias.
Book Name	String	150	If you perform a new import, then it is recommended that you only specify a value for the Book

Default Book Users Field Name	Data Type	Maximum Length	Comments
			Name field, or the Book Id, not both.
Book Id	String	15	If you perform a new import, then it is recommended that you only specify a value for the Book Name field, or the Book Id, not both. If you update an existing record, then the Book Id field is mandatory.
User Identifier	String	15	If you update an existing record, then the User Identifier field is mandatory. If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User Identifier, or User External ID.
User External Id	String	30	If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User Identifier, or User External Id.
User Sign-In ID	String	50	If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User Identifier, or User External Id.

Book Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing books into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. For more information on using books in Oracle CRM On Demand, see Book Management (on page 338).

Default Books Field Name	Data Type	Maximum Length	Comments
Book Id	String	15	None
Parent Book	String	150	None
Book Type	String	30	None
Can Contain Data	String	1	None
Book Name	String	150	None
Description	String	255	None
Partner	String	100	If you want to import the Partner field, then it is recommended that you also import the Location field as well.
External Unique ID	String	30	None
Location	String	50	This field is the partner location.

Broker Profile Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing broker profile data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Broker Profile Field Name	Field Type	Maximum Length	Comments
Broker Profile Name	Text	40	The name of the broker profile.
Broker Profile Year	Picklist	30	The year during which the broker profile is valid.
Company Historic and Future Growth	Text	250	The description of the company history and future growth for the broker.
Company Overview	Text	250	Provides additional information about the broker.
Created	Text	30	Oracle CRM On Demand generates this information: the name of the person who created the broker profile followed by the date.
Currency	Picklist	15	None
Division	Text	50	None
Fax Number	Phone	35	The broker fax number
Exchange Date	Date	Not applicable	None
Modified	Text	30	Oracle CRM On Demand generates this information: the name of the person who last modified the broker profile followed by the date.
Partner	Picklist	30	The broker name.
Phone Number	Phone	35	The broker phone number.
Picklist Value Group	Text	50	None
Primary Address	Text	50	The broker primary address.
Sub Channel	Picklist	30	The broker coverage. The default valid values are as follows: Globals, Locals, Nationals, Regionals, and Wholesalers.
Segmentation	Picklist	30	The broker segmentation. The default valid values are as follows: Commercial, Growth, and Retail.
Territory/Regional Structure	Text	250	The broker territory or regional structure.
Website	Text	100	The URL for a page that contains additional broker profile information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Broker Profile Fields

Business Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing business plan fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Business Plan Fields Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Currency	Picklist	20	None
Description	Note	250	None
Division	Text	50	None
Exchange Date	Date	7	None
Notes	Text	250	None
Opportunities	Text	250	None
Parent Plan Name	Text	15	The reference field for holding the Business Plan Object ID.
Period	Text	15	The reference field for holding the Period Object ID.
Picklist Value Group	Text	50	None
Plan Revenue	Currency	22	None
Product Name	Text	15	The reference field for holding the Product Object ID.
Status	Picklist	30	None
Strengths	Text	250	None
Threats	Text	250	None

Default Business Plan Fields Name	Data Type	Maximum Length	Comments
Type	Picklist	30	None
Weaknesses	Text	250	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Campaign Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing campaigns into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Campaign Field Name	Data Type	Maximum Length	Comments
Actual Cost	Currency	15	None
Audience	Text	2000	None
Budgeted Cost	Currency	15	None
Campaign Currency	Picklist	15	None
Campaign Email	Text	50	None
Campaign Name	Text	50	Required field by default.
Campaign Phone #	Phone	40	None
Campaign Type	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, Other
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the

Default Campaign Field Name	Data Type	Maximum Length	Comments
			linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
End Date	Date	7	None
External Unique ID	Text	30	None
Leads Targeted (#)	Integer	Not applicable	None
Objective	Text	2000	None
Offer	Text	255	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Picklist Value Group	Text	50	None
Revenue Target	Currency	15	None
Source Code	Text	30	Required field by default.
Start Date	Date	7	None
Status	Picklist	30	Default valid values: Planned, Active, Completed

Related Topics

See the following topics for related information:

- Campaign Fields: Import Preparation (on page 641)
- Field Type Guidelines for Importing Data (on page 601)

- Importing Your Data (on page 776)

Campaign Recipient Fields: Import Preparation

The following table contains specific information about setting up your CSV file before campaign recipients into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. To import Campaign Recipient fields, the minimum information required is the Contact External ID and Campaign Name.

Default Product Category Field Name	Data Type	Maximum Length
Delivery Status	Text	30
Response Status	Text	30
Campaign Name	Text	100
Contact Full Name	Text	255
Campaign External ID	Text	30
Contact External ID	Text	30
Description	Text	250

Certification Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing certification data into Oracle CRM On Demand. This information supplements the guidelines given in the topic, Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Certification Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Certification Fee	Currency	22	None.

Certification ID	Text	50	It is recommended that the internal identifier for the certification be unique.
Company	Text	50	None.
Contact	Picklist	15	Use this field if the certification contact is already present in Oracle CRM On Demand.
Description	Text	250	None.
Email	Text	50	The email address for the certification contact.
First Name	Text	50	Use this field to enter the certification contact's first name only if the contact is not present in Oracle CRM On Demand.
Last Name	Text	50	Use this field to enter the certification contact's last name only if the contact is not present in Oracle CRM On Demand.
Name	Text	50	The name of the certification.
Objective	Picklist	15	None.
Owner	Picklist	30	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the certification contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Renewable	Check box	1	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Pre-Sales, Post-Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Validity (Months)	Number	22	None.
Website	Text	100	The URL to a page that contains additional certification information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Certification Fields

Certification Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing certification request data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Certification Request Field Name	Field Type	Maximum Length	Comments
Candidate Name	Picklist	15	None.
Candidate Date	Date	7	None.
Certification Name	Picklist	15	None.
Certification Number	Text	50	Certification numbers are usually unique.
Certification Status	Picklist	30	The default valid values are as follows: Requested, Granted, and Denied.
Currency	Picklist	15	None.
Description	Text	250	None.
Exchange Date	Date	Not applicable	None.
Expiration Date	Date	7	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Plan	Picklist	15	None.
Request Date	Date	7	This field displays the current date during record creation by default, but you can modify it during and after record creation.
Renewable	Check box	1	None.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Certification Fields

Claim Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing claims data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for claims data only.

Claim Field Name	Data Type	Maximum Length	Comments
Ability to Work	Picklist	30	None
Address	Text	200	None
Address Line 1	Text	100	None
Address Line 2	Text	100	None
Amount of Liability	Currency	22	None
Amount of Loss	Currency	22	None
At Fault	Picklist	30	None
Business Account	Text	15	The held away institution (business account) linked to this record.
Business Account: External System ID	Text	30	None
Category of Loss	Picklist	30	None
City	Text	50	None
Claim Number	Text	50	The predefined field for the matching record.
Class of Employee	Picklist	30	None

Claim Field Name	Data Type	Maximum Length	Comments
Closed Date	Date	Not applicable	None
Comments	Text	250	None
Company: External System ID	Text	30	Also known as the external unique ID.
Conditions	Text	50	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Country	Text	30	None
County	Text	50	None
Currency Code	Picklist	20	None
Date of Employer Aware of Claim	Date	Not applicable	None
Date of Employer Aware of Injury	Date	Not applicable	None
Division	Text	50	None
Employee Injured Number	Number	22	None
Event Number	Text	50	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Hospital Name	Text	50	None
Household	Text	15	None
Household: External System ID	Text	30	None
Injured During Working Hours	Picklist	30	None
Kind of Loss	Picklist	30	None
Liability Source	Picklist	30	None
Line of Business	Picklist	30	None
Location of Loss	Picklist	30	None
Loss Code	Picklist	30	None

Claim Field Name	Data Type	Maximum Length	Comments
Loss Date and Time	Date/Time	Not applicable	None
Loss Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Loss Type	Picklist	30	None
Medical Injury Code	Picklist	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Part of Body Injured	Picklist	30	None
People Injured Number	Number	22	None
Picklist Value Group	Text	50	None
Place of Injury	Picklist	30	None
Police Department	Text	50	None
Police Report Number	Text	50	None
Policy	Text	50	The predefined field for the matching record.
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record.
Postal Code	Text	30	None
Province	Text	50	None
Relationship to Insured	Picklist	30	None
Report Date	Date	Not applicable	None
Report Number	Text	50	None
Reported by	Picklist	30	None
Reporter Contact Info	Text	50	None
State	Text	10	None
Status	Picklist	30	None
Time of Death	Date/Time	Not applicable	None

Claim Field Name	Data Type	Maximum Length	Comments
Type of Injury	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Contact Address Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact addresses into Oracle CRM On Demand.

This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. You can import Contact Address fields into Oracle CRM On Demand only if shared addresses are set up for your company. For more information on shared addresses, see Managing Addresses.

Default Contact Address Field Name	Data Type	Maximum Length	Comments
Row ID	ID	15	None.
Contact ID	ID	15	None.
Contact External ID	Text	30	None.
Address ID	ID	15	None.
Address External ID	Text	30	None.
Address Type	Picklist	30	The following default address types are available: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic.
Primary	Checkbox	1	If the Primary field has a value of Y,

Default Contact Address Field Name	Data Type	Maximum Length	Comments
			then the address is a primary address. The values for this field are Y and N.

Contact Book Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact books into Oracle CRM On Demand.

NOTE: To import account book or contact book records, your role must include the Manage Future Books privilege.

This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. For more information on time-based book assignments, see About Time-Based Book Assignments (on page 357)

Default Book Contacts Field Name	Data Type	Maximum Length	Comments
Name	String	150	If you perform a new import, then it is recommended that you specify a value for the Name field, or the Book Id, not both. If you update an existing record, the Name field is optional.
Book Id	String	15	If you perform a new import, then it is recommended that you specify a value for the Name field, or the Book Id, not

Default Book Contacts Field Name	Data Type	Maximum Length	Comments
			both. If you update an existing record, the Book Id field is mandatory.
Book External ID	String	30	None
Contact: Id	String	15	The Contact Id is the row ID of the contact.
Contact External ID	String	30	None
Start Date	Date	None	The date on which the record activation must take place.
End Date	Date	None	The date on which the record activation must end.
Future Primary Flag	String	1	If the future primary flag has a value of Y, then the book for the current record is set as primary for the data object when the book is activated. This is based on the Start Date field. The values for this field are: Y and N.

Contact Fields: Import Preparation

If you have separate files to import for accounts and contacts, import the accounts first, and then the contacts. Ensure that your Contacts import file contains valid account names from the Accounts import file.

If you only have a Contacts import file, account records are created based on the account name data found in the Account Name field in the Contacts import file. If the contact record contains alternate address data, Oracle CRM On Demand creates a new account and populates the shipping address with the alternative address. The Billing address remains blank.

If multiple contacts are associated with the same account, the account's address fields are set to the Alternate address values associated with the first contact imported for that account. If the first contact imported does not contain alternate address data - but subsequent records *do* - the account's address fields are blank, since

only the first imported contact is considered when setting the values of the account address fields. Therefore, if you are importing from a Contacts import file only, before importing, sort the data by Account Name, then make sure that the first contact for each different Account Name contains the address you want to use for the account.

The following table contains specific information about setting up your CSV file before importing contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Contact Field Name	Data Type	Maximum Length	Comments
Account	Text	100	The text for this field is one of several fields used to match an existing Account record. If no match is found, it is the Account Name for a new Account that is created as part of the Contact import process. For more information, see About Record Duplicates and External IDs (on page 582).
Account External ID	Text	30	None
Account Location	Text	50	The text for this field is one of several fields used to match an existing Account record. For more information, see About Record Duplicates and External IDs (on page 582).
Assistant Name	Text	50	None
Assistant Phone #	Phone	40	None
Best Time to Call	Picklist	30	Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning and Saturday. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Blocked Reason Code	Picklist	30	Default values are Business, Do Not See, Do Not Ship, HR, and Legal. You can edit this picklist.
Call Frequency	Picklist	30	Default values are No See, 1-2 Times/Year, 3-4 Times/Year and >5 Times/Year. Specific to Oracle CRM On Demand Life Sciences Edition. You can

Default Contact Field Name	Data Type	Maximum Length	Comments
			edit this picklist.
Cellular Phone #	Phone	40	None
Client Since Date	Date	Not applicable	This field is automatically populated with current date once the Client value is selected in the Contact Type drop-down menu.
Contact Address	Picklist	100	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated address record.
Contact Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Contact Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Contact City	Text	50	This field is not available if shared addresses are set up for your company.
Contact Country	Picklist	30	Default values are the names of all the countries in the world. The valid value for the U.K. is UK. The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.

Default Contact Field Name	Data Type	Maximum Length	Comments
Contact Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Contact PO Box/Sorting Code	Text	50	If your file contains non-U.S. addresses, map the following address items to this field: Colonial/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Contact Province	Text	50	If your file contains non-UK addresses, map the following address items (or other equivalents of UK counties) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate and Oblast (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Contact Type	Picklist	30	Default valid values: Prospect, Customer, Partner and Competitor
Contact US State	Picklist	2	Default valid values: Standard three-letter abbreviations for all the UK counties/regions (all capital letters). The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before importing. This field is not available if shared addresses are set up for your company.
Contact Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Credit Score	Number	22	Specific to Oracle CRM On Demand Financial Services Edition.
Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.

Default Contact Field Name	Data Type	Maximum Length	Comments
Current Investment Mix	Picklist	30	Default values are Aggressive, Moderate and Conservative. Specific to Oracle CRM On Demand Financial Services Edition. You can edit this picklist.
Customer ID	Text	11	Specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	Date	7	Specific to Oracle CRM On Demand Financial Services Edition.
Degree	Picklist	30	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN and Master of Public Health. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Department	Text	75	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
Email	Text	100	If the Allow Unicode Characters in Email Fields check box on the company profile is selected, then most Unicode (UTF-8) characters are allowed. For more information about the Allow Unicode Characters in Email check box, see Configuring Company Settings (on page 21). For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses.
Experience Level	Picklist	30	Default values are None, Limited, Good and Extensive. Specific to Oracle CRM On Demand Financial Services Edition. You can edit this picklist.
External Unique ID	Text	30	None

Default Contact Field Name	Data Type	Maximum Length	Comments
First Name	Text	50	This field is required by default. Make sure that all records contain values in this field before importing.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Gender	Picklist	1	Default values are F and M. You can edit this picklist. Specific to Oracle CRM On Demand Financial Services Edition.
Home Phone #	Phone	40	None
Home Value	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Integration ID	Text	30	None
Investment Horizon	Picklist	30	Default values are Short term, Medium term and Long term. You can edit this picklist. Specific to Oracle CRM On Demand Financial Services Edition.
Job Title	Text	75	None
Last Call Date	Date/Time		Specific to Oracle CRM On Demand Life Sciences Edition.
Last Name	Text	50	This field is required by default. Make sure that all records contain values in this field before importing.
Lead Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site and Other.
Life Event	Picklist	30	Default values are Marriage, Birth of Child, Retirement, Divorce and Other. Specific to Oracle CRM On Demand Financial Services Edition.
Manager	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Contact Edit page).

Default Contact Field Name	Data Type	Maximum Length	Comments
Manager External ID	Text	30	None
Marital Status	Picklist	30	Default values are Single, Divorced, Married, Partner, Separated, Widowed and Widower. Specific to Oracle CRM On Demand Financial Services Edition.
Market Potential	Picklist	30	Default values are High, Medium and Low. Specific to Oracle CRM On Demand Life Sciences Edition.
Middle Name	Text	50	None
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr/Ms	Picklist	15	Default valid values: Miss, Mr, Ms, Mrs and Dr
Never Email	Check box	Not applicable	None
Objective	Picklist	30	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth and International Diversification. Specific to Oracle CRM On Demand Financial Services Edition.
Opt In	Check box	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Opt Out	Check box	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Own or Rent	Picklist	30	Default values are Own or Rent. Specific to Oracle CRM On Demand Financial Services Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Owner	Email	50	File data must match the User Sign In ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On email ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On email ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Personal Address External System ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated address record.
Picklist Value Group	Text	50	None
Primary Goal	Picklist	30	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets and Retirement. Specific to Oracle CRM On Demand Financial Services Edition.
Private	Check box	Not applicable	This field should be set to the checked status if you only want this contact to be viewed by the account owner.
Profession	Text	50	None.
Qualified Date	Date/Time	Not applicable	None.

Default Contact Field Name	Data Type	Maximum Length	Comments
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images.
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Risk Profile	Picklist	30	Default values are Risk Averse, Risk Taker, Conservative, Moderate, and Aggressive. Oracle CRM On Demand Financial Services Edition.
Referred by	Picklist	101	None.
Route	Picklist	30	Default values are Route 1, Route 2, Route 3 and Route 4. Specific to Oracle CRM On Demand Life Sciences Edition.
Segment	Picklist	30	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Pentamillionaires and Ultra High Net Worth. Specific to Oracle CRM On Demand Financial Services Edition.
Self-Employed	Check box	Not applicable	Specific to Oracle CRM On Demand Financial Services Edition.
Source Campaign	Picklist	100	The campaign that generated the contact.
Status	Picklist	30	This column stores the status of a client or contact. The following values are allowed: Active, Quiet Filed, and Dead Filed.
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images.
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.

Default Contact Field Name	Data Type	Maximum Length	Comments
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Tax Bracket	Number	22	Specific to Oracle CRM On Demand Financial Services Edition.
Tier	Picklist	30	Default values are Gold, Silver, Bronze, Top 100, Top, Medium and Low. Specific to Oracle CRM On Demand Financial Services Edition.
Time Zone	Picklist	30	You are not able to edit this picklist. Therefore, the values that you import must exactly match the standard valid values.
Total Assets	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Expenses	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Income	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Liabilities	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Net Worth	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Type	Picklist	30	Default values are Prospect, Customer, Partner and Competitor.
Work Fax #	Phone	40	None
Work Phone #	Phone	40	None
YTD Sales	Currency	15	Specific to Oracle CRM On Demand Life Sciences Edition.

Related Topics

See the following topics for related information:

- Contact Fields
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Contact State License Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact state licenses into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Contact State License Field Name	Data Type	Maximum Length	Comments
Contact	Text	15	None
Expiration Date	Text	7	The date on which the medical license for this contact will expire, if known.
License Number	Text	30	The required license number for the contact in the designated state.
State	Text	30	A state in the United States or a province in Canada (optional).
Status	Text	30	The default values for the status of the license are: Blank, Active, or Expired.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Contact State Licenses

Contact Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Contact Team Field Name	Data Type	Maximum Length	Comments

Default Contact Team Field Name	Data Type	Maximum Length	Comments
Contact Access	Picklist	15	Default valid values: Read-only, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Contact Full Name	Text	60	None
Team Role	Picklist	30	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	None
Contact External ID	Text	30	None
User External ID	Text	30	None

Related Topics

See the following topics for related information:

- Sharing Records (Teams)
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Course Enrolment Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing course enrolment data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Course Enrolment Field Name	Field Type	Maximum Length	Comments
Candidate Name	Picklist	15	None.
Completion Date	Date	22	None.
Course Name	Picklist	15	It is recommended that the course name be unique.
Currency	Picklist	15	None.

Description	Text	250	None.
Enrolment Date	Date	22	This field displays the current date during record creation by default, but you can modify it during and after record creation.
Enrolment Number	Text	100	None.
Enrolment Status	Picklist	30	The default valid values are as follows: Enrolled, Completed, and Incomplete.
Exchange Date	Date	Not applicable	None.
Objective	Picklist	15	None.
Offering Partner	Picklist	15	The third-party company that the candidate is enrolling with for the course. The entry is usually from the list of offering partners for the course.
Owner	Picklist	15	None.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Course Fields

Course Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing course data into Oracle CRM On Demand. This information supplements the guidelines given in the topic, Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Course Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	100	The company where the course contact works.
Contact	Picklist	15	Use this field if the course contact is already present in

			Oracle CRM On Demand.
Course Fee	Currency	22	None.
Course ID	Text	30	It is recommended that the internal identifier for the course be unique. Oracle CRM On Demand does not enforce uniqueness.
Course Length (Days)	Number	22	None.
Description	Text	255	None.
Duration (Hours)	Number	22	None.
Email	Text	100	The email address for the course contact.
Exam	Picklist	15	None.
First Name	Text	50	Use this field to enter the course contact's first name only if the contact is not present in Oracle CRM On Demand.
Format	Picklist	30	The default valid values are as follows: Instructor Led, CBT, and Self-Paced.
Hands-on Lab	Check box	1	None.
Last Name	Text	50	Use this field to enter the course contact's last name only if the contact is not present in Oracle CRM On Demand.
Medium	Picklist	30	The default valid values are as follows: Classroom, Online, and CD/DVD.
Name	Text	100	It is recommended that the course name be unique.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the course contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Pre-Sales,

			Post-Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Website	Text	100	The URL to a page that contains additional course information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Course Fields

Coverage Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing coverage data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for coverage data only.

Coverage Field Name	Data Type	Maximum Length	Comments
Begin	Date	Not applicable	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Coverage	Picklist	30	The predefined field for the matching record
Coverage Name	Text	100	None
Coverage Product	Text	15	None
Coverage Product: External System ID	Text	50	Also known as the external unique ID
Coverage Status	Picklist	30	None
Currency Code	Picklist	20	None

Coverage Field Name	Data Type	Maximum Length	Comments
Deductible	Currency	22	None
End	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Individual Limit	Currency	22	None
Insured Amount	Currency	22	None
Insured Property	Text	30	None
Insured Property: External System ID	Text	50	Also known as the external unique ID.
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Policy	Text	15	The predefined field for the matching record.
Policy: External System ID	Text	50	None
Status	Picklist	30	None
Total Limit	Currency	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Custom Object Field: Import Preparation

The following tables contain specific information about setting up your CSV file before importing custom object fields for custom objects into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Custom Object 01, Custom Object 02, and Custom Object 03

The information in the following table is valid for Custom Object 01, Custom Object 02, and Custom Object 03 only.

Default Custom Object Field Name	Data Type	Maximum Length
Name	Text	50
Account Location	Text	50
Description	Text	16,350
Custom Objects 04-15	Text	50
Division	Text	50
Custom Objects 04-15 External Unique ID	Text	30
Integration ID	Text	30
External Unique ID	Text	30
Owner	Email	50
Picklist Value Group	Text	50
Currency	Text	20
Quick Search 1	Text	50
Quick Search 2	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Number	Number	16
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Checkbox	Boolean	1
Type	Text	30

Default Custom Object Field Name	Data Type	Maximum Length
Account	Text	100
Campaign	Text	100
Contact	Text	255
Custom Object 01	Text	50
Custom Object 02	Text	50
Custom Object 03	Text	50
Dealer	Text	100
Event	Text	50
Fund	Text	50
Household	Text	50
Lead	Text	255
Opportunity	Text	100
Portfolio	Text	100
Product	Text	100
Service Request	Text	64
Solution	Text	100
Vehicle	Text	100
Account External ID	Text	30
Campaign External ID	Text	30
Contact External ID	Text	30
Custom Object 01 External ID	Text	30
Custom Object 02 External ID	Text	30
Custom Object 03 External ID	Text	30
Lead External ID	Text	30
Opportunity External ID	Text	30
Owner External ID	Text	30
Portfolio External ID	Text	30
Product External ID	Text	30

Default Custom Object Field Name	Data Type	Maximum Length
Service Request External ID	Text	30
Solution External ID	Text	30

Custom Objects 04 and higher

The information in the following table is valid for custom objects 04 and higher only.

Default Custom Object Field Name	Data Type	Maximum Length
Account	Text	100
Activity	Text	100
Book	String	150
Book:ID	String	15
Campaign	Text	100
Custom Objects 01-15	Text	50
Dealer	Text	100
Description	Text	16,350
Exchange Date	Date	32
External Unique ID	Text	30
Event	Text	50
Fund	Text	50
Fund Request	Text	50
Household	Text	1
Indexed Checkbox	Boolean	1
Indexed Currency	Currency	25
Indexed Date	Date Time	32
Indexed Number	Number	16
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30

Default Custom Object Field Name	Data Type	Maximum Length
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Integration ID	Text	30
Lead	Text	225
Name	Text	50
Opportunity	Text	100
Owner	Email	50
Portfolio	Text	100
Product	Text	100
Quick Search 1	Text	50
Quick Search 2	Text	50
Service Request	Text	64
Type	Text	30
Vehicle	Text	100
Account External Unique ID	Text	30
Activity External Unique ID	Text	30
Asset External System ID	Text	30
Campaign External Unique ID	Text	30
Company External System ID	Text	30
Contact External Unique ID	Text	30
Custom Objects 01-15 External Unique IDs	Text	30
Dealer External Unique ID	Text	30
Fund Request External Unique ID	Text	30
Household External Unique ID	Text	30
Opportunity External Unique ID	Text	30
Owner External Unique ID	Text	30
Portfolio External Unique ID	Text	30
Product External Unique ID	Text	30

Default Custom Object Field Name	Data Type	Maximum Length
Service Request External Unique ID	Text	30
Solution Request External Unique ID	Text	30
Vehicle External Unique ID	Text	30

Damage Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing damage data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for damage data only.

Damage Field Name	Data Type	Maximum Length	Comments
Claim	Text	15	The predefined field for the matching record.
Claim: External System ID	Text	50	None
Currency Code	Picklist	20	None
Damage	Text	50	None
Damage Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Damage Name	Text	50	The predefined field for the matching record.
Damaged Property Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.

Damage Field Name	Data Type	Maximum Length	Comments
Damaged Property Type	Text	50	None
Division	Text	50	None
Estimate Amount	Currency	22	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Integration Id	Text	30	None
Insurance Property	Text	15	The predefined field for the matching record.
Insurance Property: External System ID	Text	50	None
Owner	Text	15	None
Picklist Value Group	Text	50	None
Property #	Number	22	None
Owner: External Unique ID	Text	30	None

Related Topics

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Deal Registration Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing deal registrations into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Approval Status	Picklist	30	The valid values for this field are: Pending Approval, Approved, Rejected, Returned, Cancelled, and Expired.
Approved Date	Date	Not applicable	None
Associated Contact	Picklist	100	None
Associated Customer	Picklist	100	None
Associated Lead	Text	100	None
Associated Lead: External Unique ID	Text	30	None
Associated Lead: First Name	Text	50	None
Associated Lead: Last Name	Text	50	None
Associated Lead: Integration ID	Text	30	None
Associated Lead: Last Name	Text	50	None
Associated Opportunity	Picklist	100	None
Mobile Phone	Text	40	None
City	Text	50	None
Close Date	Date	Not applicable	None
Company Name	Text	50	None
Converted to Opportunity	Checkbox	Not applicable	None
Country	Picklist	50	None
Current Approver	Picklist	100	None
Created: Date	Date Time	Not applicable	None
Currency	Picklist	Not applicable	You cannot edit this picklist. Therefore, the values you import must match the valid values.

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Deal Size	Currency	15	None
Description	Text	255	None
Division	Text	50	None
Email	Text	50	None
Exchange Rate	Date	Not applicable	None
Expiration Date	Date	Not applicable	None
External ID	Text	40	None
Fax	Text	40	None
Final Approver	Picklist	100	None
First Name	Text	50	None
Job Title	Text	75	None
Last Name	Text	50	None
Middle Name	Text	50	None
Modified: Date	Date Time	Not applicable	None
Mr/Ms	Picklist	30	None
Name	Text	100	This field is required by default. Ensure that all records contain values in this field before you perform an import.
New Contact	Checkbox	Not applicable	None
New Customer	Checkbox	Not applicable	None
New Opportunity	Checkbox	Not applicable	This field indicates if the opportunity associated with the deal registration is a new one.
Next Step	Text	250	None
Objective	Text	100	None

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Objective: External Unique ID	Text	50	None
Owner	Picklist	30	The data in this field must match the user ID of an existing user of Oracle CRM On Demand. If a record does not contain a valid value for this field (including no value), its value is set to the user ID of the user performing the import. If this field is not mapped to a valid import field when running the Import Assistant, the owner is set to the user ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Owner Partner Account	Picklist	100	This field automatically displays the partner company of the owner of the deal registration by default. This field is read-only. The upload process in Oracle CRM On Demand cannot update this field.
Originating Partner Account	Picklist	100	The partner who originally discovered the opportunity. This partner is typically the same as the principal partner, but can be different. This field is optional.
Partner Programme	Picklist	50	None
Picklist Value Group	Text	50	None
Postal Code	Text	30	None
Principal Partner	Picklist	100	The primary partner is responsible for the deal registration. This field together with the Principal Partner Location field uniquely identifies a partner. This field cannot be null.
Principal Partner Location	Text	50	The location of the primary partner mentioned in the previous cell. This field together with the Principal Partner field uniquely identifies a partner. This field can be null.
Product Interest	Text	100	None

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Reject Reason	Picklist	30	None
Special Price Reqd.	Checkbox	Not applicable	None
State	Picklist	30	None
Street	Text	100	None
Submission Status	Picklist	30	The valid values for this field are: Not Submitted, Submitted, and Recalled.
Submitted Date	Date Time	Not applicable	None
Support Reqd.	Checkbox	Not applicable	None
Telephone#	Text	40	None
Type	Picklist	30	The default valid values for this field are: Standard and Nonstandard.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Dealer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing dealer fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

NOTE: This section is specific to Oracle CRM On Demand Automotive Edition.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Name	Text	100	None
Site	Text	50	None

Default Dealer Field Name	Data Type	Maximum Length	Comments
Site	Text	50	None
Parent Dealer	Text	100	None
Status	Text	255	None
Parent Site	Text	50	None
Phone Number	Phone	40	None
E-mail	Text	50	None
URL	Text	100	None
Status	Text	30	None
Fax Number	Phone	40	None
Currency	Text	20	None
Stage	Text	30	None
Ranking	Number	16	None
Billing Address	Picklist	100	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Billing Address 2, 3	Text	100 each	This field is not available if shared addresses are set up for your company.
Billing City	Text	50	This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Billing Country	Picklist	30	The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA*. Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Invoicing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Billing Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Billing US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data. This field is not available if shared addresses are set up for your company.
Invoicing Zip Code	Text	30	This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Bill to Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Shipping Address	Text	30	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Shipping Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.
Shipping Country	Picklist	30	The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA*. Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Shipping PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonial/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Shipping Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Shipping US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before importing data. This field is not available if shared addresses are set up for your company.
Shipping Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Shipping to Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
External Unique ID	Text	30	None
Parent Dealer External ID	Text	30	None
Primary Owner Id	Id	15	None

Default Dealer Field Name	Data Type	Maximum Length	Comments
Dealer Type	Text	30	None
Modified: Date External	Date/Time	32	None
Owner	Email	50	None
Modified By	Text	255	None
Row Id	Id	15	None
Integration ID	Text	30	None
Custom Object *N*	Text	50	None
Indexed Picklist 1	Text	30	None
Indexed Picklist 2	Text	30	None
Indexed Picklist 3	Text	30	None
Indexed Picklist 4	Text	30	None
Indexed Picklist 5	Text	30	None
Indexed Picklist 6	Text	30	None
Indexed Number	Number	16	None
Indexed Date	Date/Time	32	None
Indexed Currency	Currency	25	None
Indexed Long Text	Text	255	None
Indexed Short Text 1	Text	100	None
Indexed Short Text 2	Text	100	None
Indexed Checkbox	Boolean	1	None

Event Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing Event fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. If you do not see a specific field when you try to import your data, then check with your company administrator to determine the new name for the field.

Event Field Name	Data Type	Maximum Length	Comments
Row ID	ID	15	None.
Product	Picklist	100	None.
Product Category	Picklist	100	None.
Owner Alias	Text	50	None.
Description	Text	250	None.
Division	Text	50	None.
Session Details	Text	500	None.
Owner First Name	Text	50	None.
Owner Last Name	Text	50	None.
Primary Owner ID	ID	15	None.
Picklist Value Group	Text	50	None.
Integration ID	Text	30	None.
External System ID	Text	30	None.
Indexed Number	Integer	Not applicable	The value in this field must be a valid numeric value between -2147483648 and 2147483647.
Indexed Picklist 1	Picklist	30	None.
Indexed Picklist 2	Picklist	30	None.
Indexed Picklist 3	Picklist	30	None.
Indexed Picklist 4	Picklist	30	None.
Indexed Picklist 5	Picklist	30	None.
Indexed Picklist 6	Picklist	30	None.
Indexed Long Text	Text	255	None.
Indexed Short Text 1	Text	40	None.
Indexed Short Text 2	Text	40	None.
Type	Picklist	15	None.
Location	Text	100	None.

Event Field Name	Data Type	Maximum Length	Comments
Max Attendees	Integer	Not applicable.	The value in this field must be a valid numeric value between 0 and 1000000.
Name	Text	150	This field is required.
Event Objective	Text	500	This field is required.
Start Date	Date/Time	Not applicable.	None.
Budget	Currency	15	None.
CME Credit	Integer	Not applicable.	The value in this field must be a valid numeric value between -2147483648 and 2147483647.
Confirm Date	Date/Time	Not applicable.	None.
End Date	Date/Time	Not applicable.	None.
Status	Picklist	30	None.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Exam Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing exam data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Exam Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.

Company	Text	100	None.
Contact	Picklist	15	Use this field if the exam contact is already present in Oracle CRM On Demand.
Description	Text	255	None.
Email	Text	100	The email address for the exam contact.
Exam Fee	Currency	22	None.
Exam ID	Text	100	It is recommended that the internal identifier for the course be unique.
First Name	Text	50	Use this field to enter the exam contact's first name only if the contact is not present in Oracle CRM On Demand.
Format	Picklist	30	The default valid values are as follows: Multiple Choice, Q&A, and Blended.
Grading Method	Picklist	30	The default valid values are as follows: Grades, Points, and Scores.
Last Name	Text	50	Use this field to enter the exam contact's last name only if the contact is not present in Oracle CRM On Demand.
Maximum Score	Number	22	None.
Medium	Picklist	30	The default valid values are as follows: Computer-Based, Paper-Based, and Blended.
Name	Text	100	It is recommended that the exam name be unique.
Number of Questions	Number	22	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Passing Score	Number	22	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the exam contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.

Time Allowed (Minutes)	Number	22	None.
Type	Picklist	30	The default valid values are as follows: Proctored and Online. An exam is considered to be *proctored* when the candidates are supervised during the exam.
Validity (Months)	Number	22	None.
Website	Text	100	The URL to a page that contains additional exam information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Exam Fields

Exam Registration Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing exam registration data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Exam Registration Field Name	Field Type	Maximum Length	Comments
Administering Partner	Picklist	15	The third-party company administering the exam. The entry is usually from the list of administering partners for the exam.
Candidate Name	Picklist	15	None.
Completion Date	Date	7	None.
Currency	Picklist	15	None.
Description	Text	255	None.
Exam Name	Picklist	15	None.
Exchange Date	Date	Not applicable	None.

Grade Achieved	Text	50	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Score Achieved	Number	22	None.
Score Expires On	Date	7	None.
Registration Date	Date	7	This field displays the current date during record creation, but you can modify it during and after record creation.
Registration Number	Text	50	Exam registration numbers are usually unique.
Registration Status	Picklist	30	The default valid values are as follows: Registered, Passed, and Failed.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Exam Fields

Financial Account Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial accounts in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial account data only.

Financial Account Field Name	Data Type	Maximum Length	Comments
Account Holder	Text	15	None
Account Holder: External System ID	Text	30	None
Balance	Currency	22	None
Balance as of	Date/Time	Not	None

Financial Account Field Name	Data Type	Maximum Length	Comments
		applicable	
Branch	Text	15	None
Branch: External System ID	Text	30	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Division	Text	50	None
Exchange Date	Date/Time	Not applicable	None
External ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	50	The predefined field for the matching record.
Financial Account Number	Text	50	None
Financial Advisor	Text	15	None
Financial Advisor: External System ID	Text	30	None
Held Away	Boolean	1	None
Held Away Institution	Text	15	None
Held Away Institution: External System ID	Text	30	The external unique ID of the held away institution (business account) linked to this record.
Home Branch	Picklist	30	None

Financial Account Field Name	Data Type	Maximum Length	Comments
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Joint	Boolean	1	None
Open Date	Date	Not applicable	None
Owner: External System ID	Text	30	None
Parent Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Picklist Value Group	Text	50	None
Portfolio: External System ID	Text	30	None
Primary Account	Boolean	1	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Financial Account Holders Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial account holders into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial-account-holder data only.

Financial Account Holder Field Name	Data Type	Maximum Length	Comments
Business Account	Text	15	The predefined field for the matching

Financial Account Holder Field Name	Data Type	Maximum Length	Comments
			record
Business Account: External System ID	Text	30	None
Currency Code	Picklist	20	None
Division	Text	50	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record
Financial Account Holder	Text	15	None
Financial Account Holder: External System ID	Text	30	None
Financial Account Holders Name	Text	50	The predefined field for the matching record
Household	Text	15	None
Household: External System ID	Text	30	None
Joined Date	Date	Not applicable	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Picklist Value Group	Text	50	None
Primary Contact	Boolean	1	None
Role	Picklist	30	The predefined field for the matching record

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Financial Account Holdings Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial account holdings into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial-account-holdings data only.

Financial Account Holdings Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Division	Text	50	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record
Financial Account Holdings Name	Text	50	The predefined field for the matching record
Financial Product	Text	15	The predefined field for the matching record
Financial Product: External System ID	Text	50	The external unique ID of the financial product linked to this record

Financial Account Holdings Field Name	Data Type	Maximum Length	Comments
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Performance	Text	22	None
Picklist Value Group	Text	50	None
Purchase Date	Date/Time	Not applicable	None
Purchase Price	Currency	22	None
Quantity	Number	22	None
Value	Currency	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Financial Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial plans in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

Financial Plan

The information in the following table is valid for Financial Plan only.

Financial Plan Field Name	Data Type	Maximum Length	Comments
Approved by Contact	Boolean	1	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None

Financial Plan Field Name	Data Type	Maximum Length	Comments
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Division	Text	50	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record.
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Financial Plan Name	Text	50	The predefined field for the matching record.
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Picklist Value Group	Text	50	None
Portfolio	Text	15	None
Portfolio: External System ID	Text	30	None
Sent to Contact	Boolean	1	None

Financial Plan Field Name	Data Type	Maximum Length	Comments
Status	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Financial Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial products in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial product only.

Financial Product Field Name	Data Type	Maximum Length	Comments
Category	Picklist	30	None
Class	Picklist	30	None
Currency Code	Picklist	20	None
Current Price	Currency	20	None
Current Price Last Updated	Date/Time	Not applicable.	None
Division	Text	30	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Product ID	Text	50	None
Financial Product Name	Text	50	The predefined field for

Financial Product Field Name	Data Type	Maximum Length	Comments
			the matching record.
Financial Product Overview	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Integration ID	Text	30	None
MDM Product Hub ID	Text	50	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Parent Financial Product	Text	15	None
Parent Financial Product: External System ID	Text	50	The external unique ID of the parent financial product linked to this record.
Parent Financial Product: System ID	Text	50	Also known as the external unique ID.
Picklist Value Group	Text	50	None
Price Source	Text	50	Also known as the current price source.
Product Catalogue	Text	250	None
Product URL	Text	250	None
Sub-Class	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Financial Transactions Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial transactions in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field

Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial transactions only.

Financial Transactions Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record.
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Financial Product	Text	15	The predefined field for the matching record.
Financial Product: External System ID	Text	50	The external unique ID of the financial product linked to this record.
Financial Transaction Parent	Text	15	None
Financial Transaction Parent: External System ID	Text	50	The external unique ID of the financial product linked to this record.
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External Unique ID	Text	30	None

Financial Transactions Field Name	Data Type	Maximum Length	Comments
Quantity	Number	22	None
Transaction Date Time	Date/Time		None
Transaction ID	Text	50	The predefined field for the matching record.
Transaction Period	Text	50	None
Transaction Price	Currency	22	None
Transaction Source	Text	50	None
Transaction Type	Picklist	30	None
Value	Currency	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

HCP Contact Allocation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing HCP contact allocation fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default HCP Contact Allocation Field Name	Data Type	Maximum Length	Comments
HCP Contact Allocation ID	Varchar	15	Indicates the row identification number.
Allocation Type	Picklist	30	The default values for this field are Detail Allocation, Sample Allocation, Promotional Item Allocation, and

Default HCP Contact Allocation Field Name	Data Type	Maximum Length	Comments
			Sample Request Allocation.
Start Date	Date Time	7	This field is required.
Currency	Picklist	15	None.
Exchange Date	Date	Not applicable	None.
Division	Text	50	None.
End Date	Date Time	7	If an end date is defined for the HCP Contact Allocation record, then the end date must be later than the start date.
Qty Remaining	Number	22	When the HCP contact allocation is first created, the Allocation Qty and Qty Remaining fields must have the same positive value. Quantity fields must have integer values.
Qty Distributed	Number	22	When the HCP contact allocation is first created, the Qty Distributed field must be zero. Quantity fields must have integer values.
Allocation Qty	Number	22	When the HCP contact allocation is first created, the Allocation Qty and Qty Remaining fields must have the same positive value. Quantity fields must have integer values.
Contact ID	Varchar	15	Indicates the row identifier for the contact or health care professional for

Default HCP Contact Allocation Field Name	Data Type	Maximum Length	Comments
			whom the allocations are defined.
Product ID	Varchar	15	Indicates the row identifier for the product or sample for which the allocations are defined for the specific contact or health care professional.
Picklist Value Group	Text	50	None.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Insurance Property Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing insurance property data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for insurance property data only.

Insurance Property Field Name	Data Type	Maximum Length	Comments
Amount	Currency	22	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes,

Insurance Property Field Name	Data Type	Maximum Length	Comments
			each with a maximum limit of 16,350 characters.
Division	Text	50	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Picklist Value Group	Text	50	None
Policy	Text	15	The predefined field for the matching record.
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record.
Sequence	Number	22	The predefined field for the matching record.
Type	Picklist	30	The predefined field for the matching record.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Inventory Audit Report Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing inventory audit reports into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Inventory Audit Report Field Name	Data Type	Maximum Length	Comments
Comments	Note	255	None
Completed Date	Date/Time	7	None
Inventory Period	Text	15	The reference field for holding the Inventory Period Object ID.
Reason	Picklist	30	None
Reported Date	Date/Time	7	None
Status	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Inventory Period Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing inventory periods into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Inventory Period Field Name	Data Type	Maximum Length	Comments
Active	Boolean	1	This field indicates whether the inventory period is active or inactive.
End Date	Date/Time	7	This field is empty if the inventory period is active.
Reconciled	Boolean	1	This field indicates whether the inventory period has been reconciled or not.
Start Date	Date/Time	7	The starting date of the inventory period.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Invitee Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing Invitee fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. If you do not see a specific field when you try to import your data, then check with your company administrator to determine the new name for the field.

Invitee Field Name	Data Type	Maximum Length	Comments
Invitee Status	Text	30	The default value is Pending. The other values are: Attended, Cancelled, Confirmed, Declined, and Wait List.
Contact Name	Text	30	Select a contact from the associated applet.
Job Title	Text	30	The job title for the contact.
Type	Text	30	The type of contact.
Email	Text	30	None
Phone#	Text	30	None
Session Detail	Text	30	None
Comments	Text	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Involved Party Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing involved party data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for involved party data only.

Involved Party Field Name	Data Type	Maximum Length	Comments
Claim	Text	15	The predefined field for the matching record.
Claim: External System ID	Text	50	None
Contact	Text	15	The predefined field for the matching record. The Contact field is a concatenation of the last name and first name of the contact.
Contact: External System ID	Text	30	None
Currency Code	Picklist	20	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Injury Description	Text	16350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Injury Summary	Text	250	None
Integration ID	Text	30	None
Involved Party Name	Text	50	None
Location	Picklist	30	None
Owner	Text	15	The owner of the record.
Owner: External System ID	Text	30	None

Involved Party Field Name	Data Type	Maximum Length	Comments
Role	Picklist	30	The predefined field for the matching record.
Role in Accident	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Lead Event Fields: Import Preparation

The following table contains specific information about setting up your records before importing lead events into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Lead Event Field Name	Data Type	Maximum Length	Comments
Event	Text	50	Name of the event.
Event ID	ID	15	None
Event External System ID	ID	15	External system ID of event.
Lead	Text	50	Name of the lead.
Lead ID	ID	15	None
Lead External Unique ID	ID	15	External unique ID of the lead.
Row ID	ID	15	None

Lead Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing leads into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Lead Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Alias	Text	50	None
Annual Revenues	Currency	15	None
Approximate Income	Currency	15	This is the amount of the approximate annual income.
Associated Account	Text	100	None.
Associated Contact	Text	101	The maximum number of characters allowed is 101. The first name can take up to 50 characters, followed by a single space, and the last name can take up to 50 characters, giving a total of 101 characters for the field.
Associated Deal Registration	Text	100	None
Associated Deal Registration: External ID	Text	50	None
Associated Opportunity	Not applicable	Not applicable	If you are importing a converted lead, this field's value must match an existing opportunity name.
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563).
Billing Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563).
Billing City	Text	50	None
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.K. is UK. The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before import (see About Countries

Default Lead Field Name	Data Type	Maximum Length	Comments
			and Address Mapping (on page 563)).
Invoicing PO Box/Sorting Code	Text	30	If your file contains non-UK addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB and Township (see About Countries and Address Mapping (on page 563)).
Billing Province	Text	30	If your file contains non-UK addresses, map the following address items (or other equivalents of UK counties) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate and Oblast.
Billing US State	Picklist	2	Default valid values: Standard three-letter abbreviations for all the UK counties/regions (all capital letters). The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before importing.
Invoicing Zip Code	Text	50	None
Campaign	Not applicable	Not applicable	This value is specified when using the Oracle CRM On Demand Lead Import Assistant. It is not possible to directly set values for the Campaign field in the import data.
Campaign External ID	Text	30	None
Cellular Phone #	Phone	40	None
Company	Text	100	None
Contact External ID	Text	30	None
Created By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Date of Birth	Date	Not applicable	None

Default Lead Field Name	Data Type	Maximum Length	Comments
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
Email	Text	100	If the Allow Unicode Characters in Email Fields check box on the company profile is selected, then most Unicode (UTF-8) characters are allowed. For more information about the Allow Unicode Characters in Email check box, see Configuring Company Settings (on page 21). For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses.
Estimated Close Date	Date	7	None
External Unique ID	Text	30	None
First Name	Text	50	This field is required by default. Make sure that all records contain values in this field before importing.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Industry	Picklist	50	Oracle CRM On Demand does not allow modification of valid values for this field. Make sure that the import data matches the valid values for this field before importing. Alternatively, your company's Oracle CRM On Demand Administrator can create a custom Lead field that contains the valid values that you expect in your import data. This allows you to import your data into the custom field instead of

Default Lead Field Name	Data Type	Maximum Length	Comments
			this field. Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services and Telecommunications
Integration ID	Text	30	None
Job Title	Text	75	None
Last Name	Text	50	This field is required by default. Make sure that all records contain values in this field before importing.
Lead Currency	Text	20	None
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr/Ms	Picklist	15	Default valid values: Miss, Mr, Ms, Mrs and Dr
Never Email	Check box	Not applicable	None
Next Step	Text	250	None
Number of Employees	Integer	15	None
Opportunity External ID	Text	30	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.

Default Lead Field Name	Data Type	Maximum Length	Comments
Picklist Value Group	Text	50	None
Potential Revenue	Currency	15	None
Primary Phone #	Phone	40	None
Product Interest	Text	100	None
Profession	Text	50	This is the specified profession or occupation.
Rating	Picklist	30	Default valid values: A, B, C and D
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images.
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Reassign Lead Owner	Not applicable	Not applicable	This value is specified for all leads in a specific import when using the Oracle CRM On Demand Lead Import Assistant. It determines whether the imported leads are assigned to new owners based on Lead Assignment Rules defined for your company.
Referred By	Picklist	101	None
Sales Person	Picklist	30	None
Sales Person External ID	Text	30	None
Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site and Other
Status	Not applicable	Not applicable	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values and they must match the business logic.
Stoplight 1	Integer	Not	Valid values for this field are: null, 0,

Default Lead Field Name	Data Type	Maximum Length	Comments
		applicable	1, 2. For more information, see About Fields Displayed As Images.
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Web Site	Text	100	None
Work Fax #	Phone	40	None

Related Topics

See the following topics for related information:

- Leads Fields
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

MDF Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing market development fund (MDF) requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Amount Preapproved	Number	22	The total amount that the brand owner approved for the marketing activity.
Amount Requested	Number	22	The total amount that the partner is requesting for the marketing activity.
Approval Status	Varchar	30	The current approval status for the MDF request.
Approver	Varchar	15	The name of the current approver.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Campaign	Varchar	15	The campaign with which the MDF is associated.
Category	Varchar	30	The category to which the MDF request belongs.
Claim Decision Date	Date	7	The date on which a decision was made for the claim.
Claim Status	Varchar	30	Indicates the status of the MDF claim.
Description	Varchar	250	None
Division	Text	50	None
Due Date	Date	7	The date by which the request must be processed.
End Date	UTC Date Time	7	The date and time by which the marketing activity ends.
Expiration Date	UTC Date Time	7	The date after which the MDF request is no longer valid.
Fund	Varchar	15	The name of the fund associated with the MDF request.
Last Approved By	Varchar	15	The name of the person who most recently approved the request.
MDF Request Currency	Varchar	20	None
Marketing Purpose	Varchar	30	The marketing reason for the MDF request.
Owner	Varchar	15	The owner of the record.
Owner Partner Account	Varchar	15	The partner account for which the owner works.
Partner Program	Varchar	15	The partner program with which the request is associated.
Picklist Value Group	Text	50	None
Pre-Approval Date	Date	7	The date and time that the MDF request was preapproved.
Principal Partner Account	Varchar	15	The partner company that is leading the effort on the MDF request.
Reason Code	Varchar	30	The reason why a special pricing request was returned or rejected.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Region	Varchar	30	The region for which the MDF request is being made.
Request Date	Date	7	The date and time that the MDF request was created.
Request Name	Varchar	50	The name of the MDF request.
Start Date	UTC Date Time	7	The date and time when the marketing activity starts.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	UTC Date	7	The date and time when the request was submitted.
Total Claim Amount Approved	Number	22	The total claim amount that was approved for the partner.
Total Claim Amount Requested	Number	22	The total claim amount that was requested by the partner.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Message Response Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing message responses into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Message Response Field Name	Data Type	Maximum Length	Comments
Account	Text	15	None
Activity	Text	15	None

Default Message Response Field Name	Data Type	Maximum Length	Comments
Comments	Text	250	None
Contact	Text	15	None
Division	Text	50	None
Enable Follow-up	Boolean	1	None
End Time	Date/Time	7	None
External Unique ID	Text	50	None
Picklist Value Group	Text	50	None
Plan	Text	15	None
Plan Item	Text	15	None
Response	Text	30	None
Section	Text	100	None
Sequence Number	Numeric	22	None
Start Time	Date/Time	7	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Adjusting Message Responses

Messaging Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plans into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	This field describes the targeted audience for this message plan, for example, cardiac surgeons.
Code	Text	50	This field tracks messaging plans in different Row IDs. For example, if you revise a messaging plan, this field creates a copy of the messaging plan with an incremented version number.
Disclosure Mandatory	Boolean	1	When this field is selected, a disclosure message is displayed.
Division	Text	50	None
Enable Follow-up	Boolean	1	None
Expiration Date	Date Time	7	The date on which the messaging plan ends.
External Unique ID	Text	50	None
Lock Sequence	Boolean	1	This field locks the messaging plan, which prevents users from changing the sequence, or removing messages from a messaging plan.
Name	Text	200	The name of the messaging plan or the personalised messaging plan.
Picklist Value Group	Text	50	None
Priority	Number	22	None
Release Date	Date Time	7	The release date of the messaging plan.
Segment	Text	50	This field describes the market segment; that is, the group of accounts, to which the message plan is targeted, for example, tertiary care hospitals. It shows the recommended messaging plans to sales representatives when they are planning calls.
Skin	Text	30	When the messaging planner is opened for editing or previewing, the layout of the messaging plan is also displayed.
Start Date	Date Time	7	None

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments
Status	Picklist	30	The default, valid values for this field are: Approved, In Progress, Rejected, Released, Submitted.
Type	Text	30	The default, valid values for this field are: Product Launch and Targeted Messaging.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Messaging Plans

Messaging Plan Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plan items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Messaging Plan Item Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	None
Description	Text	255	None
Disable PreLoad	Boolean	1	If the Disable PreLoad field has a value of N, which is the default value, then the preload of animations for the Oracle CRM On Demand Disconnected Mobile Sales application is enabled. A value is required for this field.
Disclosure Message	Boolean	1	None
Display Name	Text	100	None
Division	Text	50	None

Default Messaging Plan Item Field Name	Data Type	Maximum Length	Comments
Name	Text	100	None
Parent Messaging Plan	Text	30	A messaging plan is made up of a number of messaging plan items. The Parent Messaging Plan field is the messaging plan to which a messaging plan item belongs. The Parent Messaging Plan field links to the name field of a messaging plan record.
Picklist Value Group	Text	50	None
Rating	Picklist	30	None
Send Type	Picklist	30	The available values are PDF Send or Standard Send. The default value is Standard Send. The Copy Enabled check box is selected and the Optimised check is deselected by default.
Sequence Number	Number	22	None
Solution Name	Text	30	None
Speaker Notes	Text	2000	None
Status	Picklist	30	None
Synopsis	Text	2000	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Messaging Plan Items

Messaging Plan Item Relation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plan item relations into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Messaging Plan Item Relation Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	None
Description	Text	255	None
Display Name	Text	100	None
Division	Text	50	None
Name	Text	100	None
Parent Messaging Plan	Text	15	None
Picklist Value Group	Text	50	None
Rating	Picklist	30	None
Sequence Number	Number	22	None
Solution Name	Text	30	None
Status	Picklist	30	None
Synopsis	Text	2000	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Messaging Plan Item Relations

Modification Tracking Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing modification tracking fields into Oracle CRM On Demand. This information supplements the guidelines in the topic, Field Type Guidelines for Importing Data (on page 601). First, you must review the following information before importing modification tracking fields.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Modification Tracking Field Name	Data Type	Maximum Length	Comments
Child Object Id	Text	15	None.
Child Object Name	Text	50	None.
Event Name	Text	150	For information on event names, see About Modification Tracking Events (on page 550).
Field Name	Text	50	None.
Object Id	Text	15	None.
Object Name	Text	50	None.
Modification Number	Number	22	None.
Modified: Date	Date Time	50	None.
Record Type	Text	50	Indicates the record type for which picklist values have been modified, for example, Account.

Related Topics

See the following topics for related information:

- Modification Tracking (on page 537)
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Note Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing notes into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Note Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None

Default Note Field Name	Data Type	Maximum Length	Comments
Account Name	Text	255	None
Campaign External ID	Text	30	None
Campaign Name	Text	255	None
Contact External ID	Text	30	None
Contact Name	Text	255	None
Description	Text	16, 035	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Opportunity External ID	Text	30	None
Opportunity Name	Text	100	None
Private	Check box	Not applicable	None
Service Request External ID	Text	30	None
Service Request Number	Number	15	None
Subject	Text	30	Required field by default.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Objective Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing objectives into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Objective Field Name	Data Type	Maximum Length	Comments

Default Objective Field Name	Data Type	Maximum Length	Comments
Account Name	Text	15	The account name associated with the defined objective.
Contact Name	Text	15	The contact name associated with the defined objective.
Currency	Text	20	The currency used for the monetary values of the objective.
Description	Text	2000	The description field for the defined objective.
Division	Text	50	None
Exchange Date	Date/Time	7	The date on which the exchange rate applies to the currency.
Objective Name	Text	30	None
Objective Revenue	Text	22	Target revenue for the objective.
Objective Target	Number	22	The Objective Target field is a quantity of sales units, prescriptions, sales calls, and so on. This quantity is defined by the Objective Units field.
Objective Units	Picklist	30	The Objective Units field defines the quantity in the Objective Targets field.
Parent Objective	Text	15	If the defined objective is associated with a parent objective, this field enables both objectives to be combined.
Period	Text	15	This period value corresponds to the criteria that the user enters when setting up forecasts in Oracle CRM On Demand.
Picklist Value Group	Text	50	None
Plan Name	Text	15	The business plan name associated with this particular objective (optional).
Product Name	Text	15	The product name associated with the objective.
Status	Picklist	30	The status of the objective.
Target Audience	Text	2000	This is the group of individuals to which the objective is applied.

Default Objective Field Name	Data Type	Maximum Length	Comments
Type	Picklist	30	The type of objective. The customer sets the values.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Objectives

Opportunity Contact Role Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing roles for contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Contact Role Field Name	Data Type	Maximum Length	Comments
Buying Role	Picklist	39	Default valid values: User, Evaluator, Approver, Decision Maker, User and Evaluator, User and Approver, User and Decision Maker, Evaluator and Approver, Evaluator and Decision Maker, Unknown
Contact External ID	Text	30	None
Contact Name	Text	255	None
Opportunity External ID	Text	30	None
Opportunity Name	Text	100	None
Primary	Check box	Not applicable	None

Related Topics

See the following topics for related information:

- Contact Fields

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Opportunity Event Fields: Import Preparation

The following table contains specific information about setting up your records before importing opportunity events into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Opportunity Event Field Name	Data Type	Maximum Length	Comments
Event	Text	50	Name of the event.
Event ID	ID	15	None
Event External System ID	ID	15	External system ID of event.
Opportunity	Text	50	Name of the opportunity.
Opportunity ID	ID	15	None
Opportunity External Unique ID	ID	15	External unique ID of the opportunity.
Row ID	ID	15	None

Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunities into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Opportunity Field Name	Data Type	Maximum Length	Comments

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Account	Text	100	Required field by default.
Account External ID	Text	30	None
Account Location	Text	50	None
Close Date	Date	7	Required field by default.
Dealer	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
Expected Revenue	Currency	15	Cannot be imported. Value that is calculated based on potential revenue field multiplied by value in Probability field.
External Unique ID	Text	255	None
Forecast	Check box	Not applicable	None
Integration ID	Text	30	None
Lead Source	Picklist	30	None
Make	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Name	Text	100	None
Next Step	Text	250	None
Opportunity Currency	Picklist	15	Read-only.
Opportunity	Text	20	None

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Currency			
Opportunity Name	Text	100	Required field by default.
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Picklist Value Group	Text	50	None
Priority	Picklist	30	Default valid values: Low, Medium, High
Probability %	Picklist	3	Default valid values: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100 **NOTE:** This field should always be exposed in the layout. If it is hidden, unexpected results occur.
Product Interest	Text	100	Specific to Oracle CRM On Demand Financial Services Edition.
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images.
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Reason Won/Lost	Picklist	30	Default valid values: Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision, Other
Reassign Opportunity	Check box	Not applicable	None
Revenue	Currency	15	None

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Sales Stage	Picklist	50	Required field by default. This field behaves differently from most fields; it will not add picklist values that do not match even if you specify that during the import process. The import data must match the valid values for this field. If you want to capture picklist values from your CSV file that do not match the default picklist values, add them to the application before importing your data. Otherwise, the entire record is rejected. Default valid values are: Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won, Closed/Lost.
Source Campaign	Picklist	30	The campaign that generated the opportunity.
Status	Picklist	30	Default valid values are Pending, Lost and Won.
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images.
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Territory	Text	50	None
Total Asset Value	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Premium	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Type	Picklist	30	None
Year	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.

Opportunity Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunity teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Opportunity Team Field Name	Data Type	Maximum Length	Comments
Opportunity Access	Picklist	15	This picklist is read-only. The values that you import must match the following default values exactly Read-only, Edit, Full, and No Access.
Opportunity Name	Text	100	None.
Opportunity External ID	Text	30	None.
User ID	Text	50	None.
User External ID	Text	30	None.
User Sign-In ID	Text	50	None.
Team Role	Picklist	30	The default values for this field are Owner, Executive Sponsor, Consultant, Partner, and Other.
Percentage Split	Integer	22	The percentage of the revenue that is to be allocated to the team member.
Currency	Text	20	None.
Exchange Date	Date	None	The date on which the exchange rate applies to the currency.

Opportunity Product Revenue Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunity product records into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
# of Periods	Integer	3	Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency specified (in the Frequency field. For example, if you have weekly recurring revenue you can track revenue for up to five years.
Asset Value	Currency	15	None
Contact Full Name	Text	255	None
Contract	Picklist	30	None
Description	Text	250	Limitation is 250 characters.
External Unique ID	Text	30	None
Forecast	Check box	Not applicable	None
Frequency	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Integration ID	Text	30	None
Opportunity External ID	Text	30	None
Opportunity Name	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner External ID	Text	30	None
Premium	Currency	15	None
Probability %	Picklist	22	None
Product External ID	Text	30	None
Product Name	Text	50	You are not able to edit this picklist. Therefore, the values you import

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
			must exactly match the valid values.
Purchase Date	Date	7	None
Purchase Price	Currency	15	None
Quantity	Number	15	None
Serial #	Text	100	None
Ship Date	Date	7	None
Start/Close Date	Date	7	None
Status	Text	30	None
Type	Picklist	30	None
Warranty	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Order Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing orders into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Order Field Name	Data Type	Maximum Length	Comments
Order ID	Text	30	The primary key to the order object. This field is read-only.
Book	String	150	None
Book:ID	String	15	None

Default Order Field Name	Data Type	Maximum Length	Comments
Order Number	Text	50	This field contains the order ID by default.
Description	Text	255	This field is the order description.
Division	Text	50	None
Owner	Varchar	15	The record owner.
Picklist Value Group	Text	50	None
Price List	Picklist	50	This picklist is read-only. The default values for this picklist are the names of the price lists.
Opportunity	Text	15	None.
Account	Text	15	None.
Final Account	Text	15	This field is used when the Ebiz PIP Integration value is selected for the Order Usage setting in the company profile. Ebiz PIP Integration is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution, and therefore this field is not available to Oracle CRM On Demand Order Management. For more information on Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, contact Customer Care.
Activity	Text	15	None.
Contact	Text	15	None.
Shipping Address	Text	15	The address to which the order is shipped.
Billing Address	Text	15	The address to which the order is billed.
Order Creation Status	Picklist	30	The status code for the order. For more information on this field, see Order Fields.
Order Integration Message	Text	255	This field is populated only when the Ebiz PIP Integration value is selected for the Order Usage setting in the company profile. Ebiz PIP Integration is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution, and therefore this field is not available to Oracle CRM On Demand Order Management. For more information on Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, contact Customer Care.

Order Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing order items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Order Item Field Name	Data Type	Maximum Length	Comments
Product	Text	15	This field contains the foreign key for the product ID. It is a required field.
Order	Text	15	This field contains the foreign key for the order ID. It is a required field.
Order Item Number	Text	15	This field contains the object's primary key by default.
Quantity	Number	22	This field contains the quantity of products ordered. It is a required field.
Item Price	Number	22	None.
Discount Amount	Number	22	None.
Discount Percentage	Number	22	None.
Price After Discount	Number	22	None.

Partner Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing partners into Oracle CRM On Demand. This information supplements the guidelines in the topic, Field Type Guidelines for Importing Data (on page 601). First, you must review the following information before importing partners.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Partner Field Name	Data Type	Maximum Length	Comments

Default Partner Field Name	Data Type	Maximum Length	Comments
# Physicians	Number	22	This is specific to Oracle CRM On Demand Life Sciences Edition.
Account Partner	Check box	1	None
Annual Revenues	Currency	15	None
Billing Address	Picklist	100	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Billing Address 2	Text	100	This field is not available if shared addresses are set up for your company.
Billing Address 3	Text	100	This field is not available if shared addresses are set up for your company.
Billing City	Text	50	This field is not available if shared addresses are set up for your company.
Billing Country	Picklist	30	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Billing PO /Sorting Code	Text	30	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Billing Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. State to this

Default Partner Field Name	Data Type	Maximum Length	Comments
			field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 563)).
Billing US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data. This field is not available if shared addresses are set up for your company.
Billing ZIP/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Bill To Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Call Frequency	Picklist	30	This field is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Channel Account Manager	Text	50	None
Compliance Review Date	UTC Date Time	7	This is the date that the Compliance Status is due for review.
Compliance Status	Picklist	30	You can edit this picklist.
Description	Text	255	None
Division	Text	50	None
Expertise	Text	30	You can edit this picklist.
External Unique ID	Text	30	None.
Furigana Name	Text	100	None.

Default Partner Field Name	Data Type	Maximum Length	Comments
HIN	Text	30	Health Industry Number (HIN).
Industry	Picklist	50	This picklist is read-only. The default values for this picklist are: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications.
Influence Type	Picklist	30	You can edit this picklist.
Last Assignment Completion Date	UTC Date Time	7	None
Last Assignment Submission Date	UTC Date Time	7	None
Last Call Date	UTC Date Time	7	None
Location	Text	50	None
Main Fax #	Phone	40	None
Main Phone #	Phone	40	None
Market Potential	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Segment	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Share	Number	Not applicable	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist. This number is between zero (0) and 100.
Maximum Number of Users	Integer	Not applicable	None
Number of Employees	Integer	22	None
Originating Partner Account	Picklist	100	This picklist is read-only. This picklist contains the value of the valid partner.
Owner	Text	50	This field contains the name of the current owner of this record.
Owner Partner Account	Picklist	100	This picklist is read-only.
Partner Currency	Picklist	15	This picklist is read-only. This value must match the existing value for the

Default Partner Field Name	Data Type	Maximum Length	Comments
			current partner currency.
Partner Level	Picklist	30	You can edit this picklist.
Partner Name	Text	100	This is the partner's name.
Partner Organisation Status	Picklist	30	This field indicates if the partner is an active or an inactive Partner Relationship Partner (PRM) organisation. When this is set to active, a book is automatically created for the partner organisation. Their users are automatically added to the book. This book is only used when relating partners to each other in the Partner Relationship Related Item under the Partner Record field. You can edit this picklist.
Picklist Value Group	Text	50	None
Price List	Picklist	50	This picklist is read-only. The default values for this picklist are the names of the price lists.
Primary Partner Type	Picklist	30	This picklist is read-only. The default values in this picklist are the partner types associated with the partner.
Principal Partner Account	Picklist	100	This picklist is read-only. The default value for this picklist is the value of the partner.
Priority	Picklist	30	You can edit this picklist.
Public Company	Check Box	Not applicable	None.
Ranking	Number	22	None.
Reassign Account	Check box	Not applicable	This field indicates that the account should be reassigned. When imported, this triggers automatic assignment rules for this account record, if your company administrator or manager has set up this feature.
Reference	Check Box	Not applicable	This field should be set to the checked status if there is an agreement for this account to be given out as a reference to prospects.

Default Partner Field Name	Data Type	Maximum Length	Comments
Reference as of	Date	Not applicable	None
Region	Picklist	25	You can edit this picklist. The default valid values are East, West, and Central.
Route	Picklist	30	You can edit this picklist.
Shipping Address	Picklist	100	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Shipping Address 2	Text	100	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Shipping Address 3	Text	50	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563). This field is not available if shared addresses are set up for your company.
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.
Shipping Country	Picklist	30	The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA*. Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before

Default Partner Field Name	Data Type	Maximum Length	Comments
			importing data (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Shipping PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Shipping Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 563)). This field is not available if shared addresses are set up for your company.
Shipping US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data. This field is not available if shared addresses are set up for your company.
Shipping ZIP/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Shipping To Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address

Default Partner Field Name	Data Type	Maximum Length	Comments
			record.
Source Campaign	Picklist	100	This picklist is read-only. The default value for this picklist is the name of the source campaign that generated the account.
Status	Picklist	30	You can edit this picklist.
Territory	Picklist	50	This picklist is read-only. The default field in this picklist is the name of the territory.
Web Site	Text	100	None.
YTD Revenue	Currency	22	This is specific to Oracle CRM On Demand Life Sciences Edition. This stands for Year To Date.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Partner Program Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing partner programs into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Partner Program Field Name	Data Type	Maximum Length	Comments
Begin Date	Date/Time	7	None
Deal Registration Allowed	Checkbox	Not applicable	None
Description	Text	16, 350	None
End Date	Date/Time	7	None

Default Partner Program Field Name	Data Type	Maximum Length	Comments
MDF Allowed	Checkbox	Not applicable	None
Owner Full Name	Picklist	30	None
Partner Program Name	Text	30	None
Partner Type	Picklist	30	None
Program Type	Picklist	30	None
Special Pricing Allowed	Checkbox	Not applicable	None
Status	Picklist	30	None

Plan Account Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Plan Account Field Name	Data Type	Maximum Length	Comments
Account	Picklist	15	The reference field for holding the Account Object ID.
Business Plan	Picklist	15	The reference field for holding the Business Plan Object ID.
Division	Text	50	None
Picklist Value Group	Text	50	None
Primary Plan Account	Boolean	1	Indicates whether the account is a primary account.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)

- Importing Your Data (on page 776)
- Plan Accounts

Plan Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Plan Contacts Field Name	Data Type	Maximum Length	Comments
Business Plan	Picklist	15	The reference field holding the Business Plan Object ID.
Contact	Picklist	15	The reference field holding the Contact Object ID.
Division	Text	50	None
Picklist Value Group	Text	50	None
Primary Plan Contact	Boolean	1	Indicates whether the contact is the primary contact.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Plan Contacts

Plan Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan opportunities into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Plan Opportunity Field Name	Data Type	Maximum Length	Comments
Division	Text	50	None
Picklist Value Group	Text	50	None
Opportunity	Text	15	The reference field for holding the Opportunity Object ID.
Business Plan	Text	15	The reference field for holding the Business Plan Object ID.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Plan Opportunities

Policy Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing policies in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for policy data only.

Policy Field Name	Data Type	Maximum Length	Comments
Billing Status	Picklist	30	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Cancelled Date	Date	Not applicable	None

Policy Field Name	Data Type	Maximum Length	Comments
Company: External System ID	Text	30	None
Currency Code	Picklist	20	None
Division	Text	50	None
Effective Date	Date	Not applicable	None
Expiration Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Face Amount	Currency	22	None
Financial Account	Text	15	None
Financial Account: External System ID	Text	30	None
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Invoice Due Date	Date	Not applicable	None
Owner: External System ID	Text	30	None
Parent Policy	Text	15	None
Parent Policy: External System ID	Text	50	The external unique ID of the parent policy linked to this record.
Picklist Value Group	Text	50	None

Policy Field Name	Data Type	Maximum Length	Comments
Policy Number	Text	50	The predefined field for the matching record. This field is also known as the policy number field.
Policy Pay Method	Picklist	30	None
Policy Type	Picklist	30	None
Primary Agency	Text	15	None
Primary Agency: External System ID	Text	30	The external unique ID of the primary agency (business account is set to partner) linked to this record.
Primary Agent	Text	15	None
Primary Agent: External System ID	Text	30	The external unique ID of the primary agent (contact) linked to this record.
Producer Code	Text	50	None
Rate Plan	Picklist	30	None
Rate State	Picklist	30	None
Referral Source	Picklist	30	None
Status	Picklist	30	None
Sub Status	Picklist	30	None
Term	Text	50	None
Total Premium	Currency	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Policy Holder Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing policy holders in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for policy holder data only.

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Business Account Holder	Text	15	None
Business Account Holder: External System ID	Text	30	None
Company: External System ID	Text	50	None
Contact Holder	Text	15	None
Contact Holder: External Unique ID	Text	50	None
Currency Code	Picklist	20	None
Division	Text	50	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Household Holder	Text	15	None
Household Holder: External System ID	Text	30	None
Holder Percentage	Percent	22	None
Insured Type	Picklist	30	None
Integration ID	Text	30	None
Owner: External System ID	Text	30	None
Picklist Value Group	Text	50	None

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Policy	Text	15	The predefined fields for the matching record
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record
Policy Holder Name	Text	250	The predefined fields for the matching record
Role	Picklist	30	The predefined fields for the matching record

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Portfolio Fields: Import Preparation

NOTE: This feature might not be available in your version of the application as it is not part of the standard application.

The following table contains specific information about setting up your CSV file before importing the portfolio accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Account Number	Text	100	None
Account Type	Picklist	30	Default valid values: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings and Other.
Annual % Rate	Number	15	None
Cancelled/Sold Date	Date	7	None
Credit Limit	Currency	20	None
Division	Text	50	None
Effective Date	Date	7	None
Expiration Date	Date	7	None
External Unique ID	Text	30	None
Face Value	Currency	20	None
Institution	Text	100	None
Institution Location	Text	50	None
Loan Amount	Currency	20	None

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Maturity	Date	7	None
Picklist Value Group	Text	50	None
Premium	Currency	20	None
Primary Owner ID	Text	50	None
Product	Text	50	None
Purchase Date	Date	7	None
Revenue	Currency	20	None
Risk Class	Text	50	None
Status	Picklist	30	Default valid values: Active, Pending, Quote, Terminated and Closed.
Term	Number	20	None
Term Unit	Picklist	20	Default valid values: Day, Week, Month and Year.
Total Asset Value	Currency	20	None
Valuation Date	Date	7	None

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Institution External ID	Text	30	Institution links to account.
Product External ID	Text	30	None

Related Topics

See the following topics for related information:

- Portfolios
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Price List Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing price lists into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Price List Field Name	Data Type	Maximum Length	Comments
Currency	Varchar	20	The currency of the price list.
Description	Varchar	255	None
Effective From	UTC DateTime	7	The date from which the price list is effective.
Effective To	UTC DateTime	7	The date to which the price list is effective.
Owner	Varchar	15	The owner of the record.
Price List Name	Varchar	50	None
Status	Varchar	30	The current status of the price list, for example, In Progress, Published, and

Default Price List Field Name	Data Type	Maximum Length	Comments
			so on.
Type	Varchar	30	The type of price list.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Price List Line Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing price list line items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Price List Line Item Field Name	Data Type	Maximum Length	Comments
Description	Varchar	255	None
Effective From	UTC DateTime	7	The date from which the price list is effective.
Effective To	UTC DateTime	7	The date to which the price list is effective.
List Price	Number	22	The price of the product.
Owner	Varchar	15	The owner of the record.
Price List	Varchar	15	The name of the price list with which this line item is associated.
Price Type	Varchar	30	The type of price on the line item, for example, standard.
Product	Varchar	15	The product of the price line item.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Product Category Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing product category fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Campaign Recipients Field Name	Data Type	Maximum Length
Category Name	Text	100
Parent Category	Text	100
External Unique ID	Text	30
Parent Product Category External ID	Text	30
Description	Text	16,350

Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Product Field Name	Data Type	Maximum Length	Comments
Body	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition. Default valid values: Coupe, 4 x 4, Cabriolet, Hatchback, Wagon, Sedan
Category	Picklist	30	Default valid values: Clothing, Tractor, SUV, Interior, Heavy Truck, Exterior, Electrical, DriveTrain, Light Truck,

Default Product Field Name	Data Type	Maximum Length	Comments
			Passenger Car
Controlled	Check box	Not applicable	None
Dealer Invoice Price	Currency	15	Specific to Oracle CRM On Demand Automotive Edition.
Description	Text	255	None
Division	Text	50	None
Door	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition. Default valid values: 3 Door, 2 Door, 4 Door
Engine	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Lot # Tracking	Check box	Not applicable	None
Make	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Orderable	Check box	Not applicable	None
Parent Product	Text	100	None
Part #	Text	50	None
Picklist Value Group	Text	50	None
Price Type	Picklist	30	None
Product Category	Text	100	None
Product Currency	Currency	15	None
Product Name	Text	100	Required field by default.
Product Type	Picklist	30	None
Revision	Picklist	30	None
Serialised	Check box	Not applicable	None

Default Product Field Name	Data Type	Maximum Length	Comments
Status	Picklist	30	None
Sub Type	Picklist	30	None
Therapeutic Class	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition.
Transmission	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Trim	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Type	Picklist	30	None
Year	Number	50	Specific to Oracle CRM On Demand Automotive Edition.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Product Indication Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Product Indication Field Name	Data Type	Maximum Length	Comments
Division	Text	50	None
Picklist Value Group	Text	50	None
Product Indication Name	Text	50	Must be unique in a company.
Product ID	Reference	Not Applicable	The product lookup at the Brand level.
Product Name	Reference	Not	The product name lookup at the Brand

Default Product Indication Field Name	Data Type	Maximum Length	Comments
		Applicable	level.
Product Category	Reference	Not Applicable	Read-only text. This name displays the product category of the selected product brand.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Sample Disclaimer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample disclaimers into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Disclaimer Field Name	Data Type	Maximum Length	Comments
Comments	Text	255	This field provides supplementary information on the disclaimer field.
Country	Picklist	30	The country to which the disclaimer is targeted.
Number	Text	15	None.
Division	Text	50	None.
Picklist Value Group	Text	50	None.
Default Language	Picklist	30	The default language for the related disclaimer record.
Disclaimer Text	Text	1000	This is the disclaimer text.
End Date	Date/Time	7	The disclaimer expiration date.
Start Date	Date/Time	7	The disclaimer activation date.

Default Sample Disclaimer Field Name	Data Type	Maximum Length	Comments
Status	Picklist	30	The values for this field are: Active, Inactive, and Expired.
Type	Picklist	30	This value indicates if the disclaimer is global or multilingual.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Sample Inventory Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample inventories into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Inventory Field Name	Data Type	Maximum Length	Comments
Audit ReportID	Text	15	None
Division	Text	50	None
Inventory Period	Text	15	The reference field pointing to the Inventory Period Object ID.
Last Physical Count	Number	22	None
Lot#	Text	15	None
Opening Balance	Number	22	None
Physical Count	Number	22	None
Picklist Value Group	Text	50	None
Sample	Text	15	The reference field pointing to the sample product of this inventory.
System Count	Number	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Sample Inventory

Sample Lot Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample lots into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Lot Field Name	Data Type	Maximum Length	Comments
CutOff Date	Text	255	The text version of the CutOff_Date field.
Cutoff_Date	Date	10	This date is calculated. The calculation is based on the expiration date minus the value provide in the Short Days field. of the short days. For example, if the expiration date is January 31, and if the value in the Short Days field is 30, then the value in the Cutoff_Date field is January 1. This date indicates that the sample lot must be used in the immediate future or returned to the head office.
Description	Text	255	The lot description.
Division	Text	50	None
Expiration Date	Date	7	The expiration date of the sample lot.
Inventory By Lot	Boolean	1	This field indicates whether the inventory is tracked at the lot level or product level.
Lot#	Text	100	The lot name.
Orderable	Boolean	1	This field indicates whether the lot can be ordered.
Picklist Value Group	Text	50	None

Default Sample Lot Field Name	Data Type	Maximum Length	Comments
Product Level	Number	22	None
Sample	Text	15	The product name.
Short Days	Number	22	The number of lead days.
Start Date	Date	7	The sample lot start date.
UoM	Text	30	The unit of measure.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- Sample Lots

Sample Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following information before importing data.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Request Field Name	Data Type	Maximum Length	Comments
Account	Text	15	None.
Account: External Unique ID	Text	30	The unique external ID of the parent account record to which the sample request is linked.
Book	String	150	None
Book:ID	String	15	None
Billing Address	Text	15	The address to which the order is billed.
Contact	Text	15	This field is required.

Default Sample Request Field Name	Data Type	Maximum Length	Comments
Contact: External Unique ID	Text	30	The unique external ID of the parent contact record to which the sample request is linked.
Currency	Picklist	15	The values in this picklist are read-only. The values that you import must match the valid values in this picklist.
Description	Text	255	This field contains the description of the sample request record.
Division	Text	50	None
Exchange Date	Date	Not applicable	None
External Flag	Text	1	The values for this field are: Y and N. If the external flag has a value of Y, then it indicates that the sample request is created by an external system.
External Unique ID	Text	30	None.
Id	Text	15	This field is the sample request identifier.
Order Created	UTC Date Time	7	The date and time when the order was created.
Order Integration Message	Text	255	None.
Order Number	Text	50	The default value of this field is the order ID.
Owner	Text	15	This field displays the record owner.
Owner: External Unique ID	Text	30	The unique external ID of the parent owner record to which the sample request is linked.
Picklist Value Group	Text	50	None
Shipping Address	Text	15	The address to which the order is shipped. This field is required.
Shipping Address Id	Text	15	The ID field of the shipping address.
Status	Picklist	30	The status code for the sample request.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Sample Request Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample request items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following information before importing data.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Request Items Field Name	Data Type	Maximum Length	Comments
Contact: External Unique ID	Text	30	None.
Currency	Picklist	15	The values in this picklist are read-only. The values that you import must match the valid values in this picklist.
Discount Amount	Number	22	None.
Discount Percent	Number	22	None.
Division	Text	50	None.
Id	Text	15	This field is the sample request item identifier.
Order	Text	15	This field contains the Sample Request ID. This field is required.
Order Item Number	Text	15	This field contains the Sample Request Item ID.
Owner: External Unique ID	Text	30	The unique external ID of the parent sample request record to which the sample request item is linked.
Picklist Value Item	Text	50	None.
Price	Number	22	None.
Price After Discount	Number	22	None.

Default Sample Request Items Field Name	Data Type	Maximum Length	Comments
Product	Text	15	This field contains the foreign key for the product ID. It is a required field.
Product: External Unique ID	Text	30	The unique external ID of the parent product record to which the sample request item is linked.
Quantity	Number	22	This field contains the quantity of products ordered. It is a required field, and the value must be greater than zero. **NOTE:** If a Sample Request Allocation record type is defined, then the value in the Quantity field is validated against its corresponding Allocation Qty, Max Qty and Max Qty per Customer fields. If this validation fails, then you cannot import the Sample Request Item record type into Oracle CRM On Demand.
Status	Picklist	30	The status code for the sample request item.

NOTE: If a product is blocked for a contact, then you cannot import a sample request item for that product for the contact. If you attempt to do so, then the record is not imported, and an error message is recorded in the log file for the import request. For more information about blocking products for contacts, see Blocked Products.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Sample Transaction Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample transactions into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

If you want to use a workflow action to automatically submit a number of sample transactions during import, then use a custom field, for example, set Mark for Submit to Y, to indicate that the sample transactions are ready to be submitted after the import completes. For more information on using the submit workflow action to submit sample transactions, see Setting Up the Automatic Submission of Sample Transactions (on page 839).

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Transaction Field Name	Data Type	Maximum Length	Comments
# of Packages Sent	Number	22	The number of packages being sent when sample transactions are transferred out.
# of Packages Received	Number	22	The number of packages that were received when sample transactions were transferred in.
Adjustment Reason	Picklist	30	The default values for this field are: Human Error, Theft, Initial Count, Lost, Found and Request.
Comments	Text	255	The description field.
Date	Date/Time	7	The date of the transaction.
Division	Text	50	None
Expected Arrival Date	Date/Time	7	None
Expected Delivery Date	Date/Time	7	None
From Transaction	Text	15	None
Inventory Period: Start Date	Date/Time	7	None
Inventory Period: End Date	Date/Time	7	None
Invoice #	Text	15	None
Name	Text	50	None
ParentTxn	Text	15	None
Picklist Value Group	Text	50	None
Received Date	Date/Time	7	None
Root Transaction	Text	15	None
Status	Picklist	30	The default values are: In Progress, In Transit, Adjusted, Processed, and Processed with Discrepancies.

Default Sample Transaction Field Name	Data Type	Maximum Length	Comments
Sent Date	Date/Time	7	None
Tracking #	Text	15	None
Transfer To	Text	15	None
Type	Picklist	30	The default values are: Transfer In, Transfer Out, Sample Lost, Inventory Adjustment, and Disbursement.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Service Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing service requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Service Request Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Area	Picklist	30	Default valid values: Product, Installation, Maintenance, Training, and Other
Cause	Picklist	30	Default valid values: Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Closed	Time	Date/Time	None

Default Service Request Field Name	Data Type	Maximum Length	Comments
Contact	Text	255	None
Contact External ID	Text	30	None
Dealer	Picklist	100	Oracle CRM On Demand Automotive Edition
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
External Unique ID	Text	30	None
Opened Time	Date/Time	7	None
Opportunity	Text	100	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Picklist Value Group	Text	50	None
Principal Partner Account	Varchar	15	None
Priority	Picklist	30	Default valid values: 1-ASAP, 2-High, 3-Medium, 4-Low

Default Service Request Field Name	Data Type	Maximum Length	Comments
Product	Picklist	100	None
Reassign Owner	Check box	Not applicable	None
Servicing Dealer	Text	70	Oracle CRM On Demand Automotive Edition
Source	Picklist	30	Default valid values: Phone, Web, Email, Fax
SR Currency	Text	20	None
SR Number	Text	64	None
Status	Picklist	30	Default valid values: Open, Pending, Closed, Open - Escalated, Cancelled
Subject	Text	250	None
Type	Picklist	30	Default valid values: Question, Issue, Enhancement Request, Other
Vehicle	Text	100	None

Related Topics

See the following topics for related information:

- Service Request Fields
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Signature Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing signatures into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Signature Field Name	Data Type	Maximum Length	Comments

Default Signature Field Name	Data Type	Maximum Length	Comments
Activity ID	Text	15	None
Contact First Name	Text	50	None
Contact Last Name	Text	50	None
Disclaimer Text	Text	500	None
Header Text	Text	800	None
Sales Rep First Name	Text	50	None
Sales Rep Last Name	Text	50	None
Signature Control	Text	16000	This field holds the signature x and y coordinates.
Signature Date	Date	7	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Social Profile Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing social profiles into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). You must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Social Profile Field Name	Data Type	Maximum Length	Comments
Community	Text	255	The name of the social media site, such as Facebook or Twitter, where the contact was observed.
Currency	Picklist	15	None.
Exchange Date	Date	Not applicable	None.

Default Social Profile Field Name	Data Type	Maximum Length	Comments
Author Link	URL	255	A Web link to the user's profile page for that social media type. It opens a new window.
Author	Text	100	The unique user name of the contact on the social media site.
Active	Boolean	1	Indicates whether the social media profile is active. The default value is true (1).

Solution Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing solutions into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Solution Field Name	Data Type	Maximum Length	Comments
Division	Text	50	None
External Unique ID	Text	30	None
FAQ	Text	250	None
Integration ID	Text	30	None
Picklist Value Group	Text	50	None
Product Category	Picklist	100	None
Published	Picklist	1	Default valid values are Y and N. These values must be in English, regardless of your language settings.
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images.
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.

Default Solution Field Name	Data Type	Maximum Length	Comments
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Service Request Count	Integer	22	None
Solution Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Solution Details	Text	16,000	None
Solution Rating	Number	15	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Status	Picklist	30	Default valid values: Draft, Approved, Obsolete
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images.
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Title	Text	100	Required field by default.

Related Topics

See the following topics for related information:

- Solution Fields
- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Special Pricing Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing special pricing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Special Pricing Product Field Name	Data Type	Maximum Length	Comments
Authorised Cost	Number	22	The partner's price that is under negotiation for the special pricing request.
Competitor Name	Varchar	100	The name of the competitor for the request.
Competitor Partner	Varchar	100	The name of the competing partner.
Competitor Product	Varchar	100	The name of the competitor's product.
Competitor Product Price	Number	22	The price of the competitor's product.
Currency	Varchar	20	None
Description	Varchar	250	None
MSRP	Number	22	The manufacturer's suggested retail price (MSRP) in the currency used.
Other Competitive Information	Varchar	250	Any other information regarding competitive product offerings, for example, special price justification, and so on.
Product	Varchar	15	The name of the product for the special pricing request.
Purchase Cost	Number	22	The price that the partner originally paid to purchase the product.
Quantity	Number	22	The expected quantity of products that will be sold under this request.
Requested Cost	Number	22	The reduced price that the partner requested.
Requested Resale Price	Number	22	The resale price at which the partner wanted to sell the product.
SP Request	Varchar	15	The special pricing request that this special pricing product is associated with.
Suggested Resale Price	Number	22	The resale price suggested by the brand owner.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Special Pricing Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing special pricing requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Approval Status	Varchar	30	The approval status for the special pricing request.
Approver	Varchar	15	The name of the approver.
Authorised Date	UTC Date Time	7	The date and time when the special pricing request was approved.
Claim Decision Date	Date	7	The date on which a decision was made for the claim.
Claim Status	Date	7	The status of the special pricing claim.
Currency	Varchar	20	The currency of the special pricing request.
Deal Registration	Varchar	15	The deal registration that is associated with the special pricing request.
Description	Varchar	15	None
Due Date	Date	7	The date by which the request must be processed.
End Customer	Varchar	15	The customer for the request. If the request is associated with an opportunity, then you can select opportunity account.
End Date	UTC Date	7	The date and time after which the special pricing is no longer effective.
Fund	Varchar	15	The name of the fund associated with the special pricing request.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Last Approved By	Varchar	15	The name of the person who most recently approved the request.
Opportunity	Varchar	15	The opportunity to which the request is related.
Originating Partner Account	Varchar	15	The partner who originated the special pricing request.
Owner	Varchar	15	The record owner.
Owner Partner Account	Varchar	15	The partner account for which the owner works.
Partner Program	Varchar	15	The partner program with which the request is associated.
Principal Partner Account	Varchar	15	The partner company that is leading the effort on the special pricing request.
Reason Code	Varchar	30	The reason why a special pricing request was returned or rejected.
Request Date	Date	7	The date and time that the special pricing request was created.
Request Name	Varchar	50	The name of the request.
Start Date	UTC Date Time	7	The date and time from which the special pricing starts.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	UTC Date Time	7	The date and time that the request was submitted.
Total Amount Authorised	Number	22	The total amount that is being authorised.
Total Amount Requested	Number	22	The total amount that was requested by the partner.
Total Claim Amount Approved	Number	22	The total claim amount that was approved for the partner.
Total Claim Amount Req.	Number	22	The total claim amount that is requested by the partner.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Task Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and a task into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Task Contact Field Name	Data Type	Maximum Length
Contact Full Name	Text	60
Contact External ID	Text	30
Task External ID	Text	30

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Task User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and a task into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Task User Field Name	Data Type	Maximum Length
User ID	Text	50

Default Task User Field Name	Data Type	Maximum Length
Task External ID	Text	30
User External ID	Text	30

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

Transaction Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing transaction items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Transaction Item Field Name	Data Type	Maximum Length	Comments
Description	Text	250	The transaction item description.
Inventory Period	Text	15	None
Line Number	Number	22	The unique number associated with the transaction header record.
Lot#	Text	15	The reference field for holding the Sample Lot ID.
Quantity	Number	22	The number of samples associated with the transaction item.
Sample	Text	15	The name of the sample that is provided with the transaction item. You must document all samples.
Shipped Quantity	Number	22	The number of samples that were shipped as a transaction item.
Transaction#	Text	15	The reference field for holding the Sample Transaction ID.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)

User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing users into Oracle CRM On Demand.

NOTE: To import user records, your role must include the Manage Users privilege.

This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default User Field Name	Data Type	Maximum Length	Comments
Alias	Text	50	Required field by default.
User Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563).
User Address 2, 3	Text	100	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 563).
User City	Text	50	None
User Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.K. is UK. The application does not allow the modification of valid values for this field. Make sure that the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 563)).
User PO Box/Sorting Code	Text	30	None
User Province	Text	50	For Canada, see About Countries and Address Mapping (on page 563). However, this is not a picklist field.

Default User Field Name	Data Type	Maximum Length	Comments
User US State	Picklist	2	For the list of valid US state values, see About Countries and Address Mapping (on page 563).
User Zip/Post Code	Text	30	None
Cellular Phone #	Phone	40	None
Currency	Text	50	This field is set at the company level, and, consequently, you cannot import this field or edit its picklist values.
Department	Text	75	None
Division	Text	75	None
Email	Text	50	Required field by default.
Email Temporary Password When I Click Save	Check box	Not applicable	If you select this check box and save, an email with a temporary password is sent to the user.
Employee Number	Number	30	None
External Unique ID	Text	30	Contains the External ID of the imported record.
First Name	Text	50	Required field by default.
Fund Approval Limit	Number	22	Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition.
Integration ID	Text	30	Identifier used for integrating with external systems.
Language	Text	50	You are not able to edit this picklist. Therefore, the values that you import must exactly match the standard valid values.
Last Name	Text	50	Required field by default.
Locale	Text	50	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Middle Name	Text	50	None
Mr/Ms	Picklist	15	None
Preserve Default Book	Check box	Not applicable	For more information on the Preserve Default Book field, see User Fields (on

Default User Field Name	Data Type	Maximum Length	Comments
			page 273).
Reports To	Text	Not applicable	This is a calculated field, based on the manager's first and last name.
Reports To External ID	Text	30	None
Role	Picklist	50	Required field by default. Default valid values: Administrator, Executive, Field Sales Rep, Inside Sales Rep, Sales & Marketing Manager, Service Manager, Service Rep.
Status	Picklist	30	Required field by default. Default valid values: Active, Inactive.
Time Zone	Text and number	100	You are not able to edit this picklist. Therefore, the values that you import must exactly match the valid values.
Work Fax #	Phone	40	None
Work Phone #	Phone	40	Required field by default.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 601)
- Importing Your Data (on page 776)
- User Fields (on page 273)

Vehicle Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle contact fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Product Category Field Name	Data Type	Maximum Length
Serial Number	Text	100

Default Product Category Field Name	Data Type	Maximum Length
Product Name	Text	100
Contact Full Name	Text	60
Contact External ID	Text	30
Vehicle External ID	Text	30
Primary	Check box	Not applicable

Vehicle Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 601). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table only contains the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

NOTE: This section is specific to Oracle CRM On Demand Automotive Edition.

Default Vehicle Field Name	Data Type	Maximum Length
Division	Text	50
Picklist Value Group	Text	50
VIN	Text	100
Make	Text	30
Model	Text	30
Year	Text	22
Trim	Text	30
Door	Text	30
Exterior Colour	Text	30
External Unique ID	Text	30
Owner External ID	Text	30
Account External ID	Text	30

Default Vehicle Field Name	Data Type	Maximum Length
Product External ID	Text	30
Selling Dealer External ID	Text	30
Service Dealer External ID	Text	30
Product Type	Text	30
Selling Dealer	Text	100
Status	Text	255
Account	Text	100
Account Type	Text	255
Contact	Text	255
Licence Number	Text	30
Licence State	Text	10
Licence Expiry	Date	32
Transmission	Text	30
Account Site	Text	50
Status	Text	30
Location	Text	30
Used/New	Text	30
Engine	Text	30
MSRP	Currency	25
Dealer Invoice Price	Currency	25
Owned By	Text	30
Modified: Date External	Date/Time	32
Modified By	Text	255
Vehicle Currency	Text	30
Interior Colour	Text	30
Warranty Type	Text	30
Warranty Start Date	Date	32
Warranty End Date	Date	32

Default Vehicle Field Name	Data Type	Maximum Length
Current Mileage	Number	16
Mileage Reading Date	Date	32
Product Name	Text	100
Type	Text	255
Body	Text	30
Description	Text	250
Owner	Email	50
Created: Date External	Date/Time	32
Row Id	Id	15
Integration ID	Text	30
Account Id	Id	15
Account Integration Id	Text	30
Custom Object *N*	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Picklist 6	Text	30
Indexed Number	Number	16
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Long Text	Text	255
Indexed Short Text 1	Text	100
Indexed Short Text 2	Text	100
Indexed Checkbox	Boolean	1
Product Category	Text	100
Part #	Text	50

Default Vehicle Field Name	Data Type	Maximum Length
Purchase Date	Date	32
Purchase Price	Currency	25
Quantity	Number	16
Ship Date	Date	32
Install Date	Date	32
Expiration Date	Date	32
Notify Date	Date	32
Contract	Text	30

Import Assistant

The following topics describe how to use the Import Assistant to import your company data into Oracle CRM On Demand:

- Importing Your Data (on page 776)
- Reviewing Import Results (on page 781)
- Example of Import Results Email and Log File (on page 782)

Importing Your Data

Before you begin. Prepare your CSV files and add any necessary fields or picklist values to the application. For more information, see Preparing for Data Importing (on page 607). Before importing data, you can determine which method of data importing best suits your requirements by reviewing the supporting documentation on My Oracle Support.

After you have prepared your data for importing, access the Import Assistant, and perform the import. To ensure that the Import Assistant processes all import requests equally, each import request is split into one or more child requests of 100 records. Child requests from different import requests are processed simultaneously, so that no import request is waiting for another request to complete before it is picked up in the queue. The processing time for an import request is updated continuously and reflects the progress of the child requests in the queue.

TIP: Make sure that your import CSV file is set up correctly by performing a test import of five records. It is much easier to correct mistakes for five imported records than for the full number in your import file.

To import records

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

2 In the Data Management Tools section, click the Import and Export Tools link.

3 In the Import Data section, select the record type you want to import from the drop-down menu.

4 Click the Launch button.

This starts the Import Assistant.

5 For Step 1:

NOTE: The following options are available depending on the record that you wish to import.

a Select how you want the Import Assistant to identify matching records.

The Import Assistant uses an external unique ID, which is a unique external ID field that is imported from another system, Oracle CRM On Demand row ID, and Oracle CRM On Demand pre-defined fields. These pre-defined fields, such as Account Name and Location, do not have IDs.

For information on how duplicate records are defined, see About Record Duplicates and External IDs (on page 582).

b Select what you want the Import Assistant to do if it finds a duplicate unique record identifier in Oracle CRM On Demand. Your choices are to not import duplicate records, to overwrite existing records or to create additional records.

NOTE: This option is not available in Notes.

c Select the action you want the Import Assistant to follow if the imported record's unique record identifier does not match an existing record in Oracle CRM On Demand.

NOTE: This option is not available in Notes. If you select Overwrite Records and Don't Create New Record in the previous option, this results in the record being updated.

d Select how you want to handle picklist values in your CSV file that do not match the values in the application.

The Import Assistant can either add the new value to the picklist or will not import the field value.

NOTE: This is not available when importing Notes or if the user's language is different to the company's default language. This is also not applicable to multi-select picklists. The multi-select picklists can only be imported if the value in the CSV file exists in the application.

e Decide if the Import Assistant should create a new record for missing associations (related records) in your data file.

NOTE: This option is only available when importing Accounts or Contacts.

f Select the date/time format used in the CSV file.

For more information, see Field Type Guidelines for Importing Data (on page 601).

g Verify that the file encoding selection is Western.

NOTE: Do not change this setting unless you are certain another encoding method is used. The default, Western, applies to most encoding systems in Europe and North America.

h Select the type of CSV delimiter used in your file: comma or semi-colon.

i In the Error Logging drop-down list, select what you want Oracle CRM On Demand to log: All messages, Errors and Warnings, or Errors Only.

j Select the CSV file whose data you want to import.

k Select the Data file records need to be processed sequentially check box if required.

NOTE: Choosing to process data files sequentially ensures that when an import request is submitted, the child import requests are always processed in sequence. It also ensures that CSV file dependencies are maintained.

l Select the check box if you want to disable auditing while importing data and if you do not want to generate any audit trail records while importing data.

NOTE: You cannot disable this auditing setting if you are importing the User record type. This option is available only if the Manage Record Auditing for Imports privilege is enabled for your role. Selecting this check box might improve import performance, depending on the record types that you want to import and the number of audited fields that you would otherwise decide to audit for those record types.

m Select the Enable Email Notification check box if you want an email notification to be sent after the import process is complete. This check box is selected by default.

6 For Step 2:

a Follow the instructions for validating your file, if necessary.

b Select a field mapping file, if available.

c Field mapping files (.map) contain the pairing of fields in your CSV file with existing Oracle CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.

7 For Step 3, map the fields in your file to Oracle CRM On Demand fields. At a minimum, you need to map all required fields to column headers in the CSV file.

The Import Assistant lists the column headers from your import CSV file next to a drop-down list showing all the fields in that area in Oracle CRM On Demand, including custom fields you added.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street

To filter your list on this field	Select this field from the drop-down list
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

If you selected a .map file, verify that the fields map correctly. Any custom fields that you created since you ran the previous import might need to be mapped.

For information about external IDs, see About Record Duplicates and External IDs (on page 582).

CAUTION: If you have selected the wrong file to import, click Cancel to change selections. At this point, using the Back button does not clear the cache, so the import file you originally selected appears in the field mapping step.

CAUTION: External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

8 For Step 4, follow the on-screen instructions, if necessary.

9 For Step 5, click Finish.

To view the queue for your import requests

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

2 In the Import and Export Queues section, click the Import Request Queue link.

The Import Request Queue page appears with information about your requests, including the estimated time of completion.

The following table describes the import status.

Status	Description
Queued	The import has not been processed yet.
In Progress	The import is being processed. **NOTE:** You can delete the request in this state. However, you must review any data that is partially imported into Oracle CRM On Demand.
Completed	No errors during import.
Completed with errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.
Cancelled	The import was cancelled.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every 20 seconds, or as set by a system process.
# Successfully Imported	The number of records that were imported without any problems.
# Partially Imported	The number that was imported but not all the fields for the record were imported.
# Not imported	The number of records that were not imported at all.
#Cancelled	The number of records imported before the import was cancelled.

To import multi-select picklist values

1 Separate the multivalue picklists by a semicolon in the CSV file.

For example, if you have a multivalue picklist containing first names and you want to import four names into this field, separate each name with a semicolon.

2 Click Add New Value To Picklist.

Oracle CRM On Demand imports your multivalue picklist.

Reviewing Import Results

You can track the progress of the import by reviewing the queue page in Oracle CRM On Demand. When the import request is completed, you can navigate to the import queue, and drill down on the completed import job. Each import request contains the submitted data file, generated map file, and a log file. This log file provides basic, log file information, including errors, the status of the import, and so on. If an error occurs during the import, it is recommended that you review the log file attached to the import request.

If you enabled email notification during import preparation, then you will receive an email message when your import request is completed. The email message summarises the import and contains a log file, which lists the records and fields that were not imported.

You can then correct the data in your CSV file and import the information again. The second time, you should direct the system to overwrite existing records when it encounters duplicate records.

To view your import request queue

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

2 In the Import and Export Tools section, click the Import and Export Tools link.

3 In the Import and Export Queues section, click the Import Request Queue link.

The Import Request Queue page appears, showing the time the import was completed or estimating the completion time.

To review the email message with import results

- Go to your email application and open the email message from Oracle CRM On Demand.

The message lists any errors that occur on a record-by-record basis along with action you should take, if you want to capture the complete data for that record.

Related Topics

See the following topic for related information:

- Example of Import Results Email and Log File (on page 782)

Example of Import Results Email and Log File

If you enabled email notification during import preparation, then you will receive an email message when your import request is completed. This email summarises the import results:

Dear Mike,

Your import request completed at 3/30/2007 7:10:06 AM. Here is a summary of the results:

User: qa/mjones

Import Type: Account

Import File Name: Accounts.csv

Time Completed: 3/30/2007 7:10:06 AM

Total Records: 496

Successfully Imported: 495

Partially Imported: 1

Duplicate Records Ignored: 0

Failed: 0

For more details on your import, please review the log file. If you require further assistance, refer to the online help.

Thank you for using Oracle CRM On Demand,

Oracle CRM On Demand Customer Care

Attached to the email is a log file listing each error that occurs during the import process, such as the following:

Record Specific Error EXTERNAL_SYSTEM_ID: 46552 No matching record is found for import field 'CURRENCY' with value 'INR'. The Oracle CRM On Demand field 'Account Currency' was not updated, but other field values were imported for this record.

Export Assistant

The following topics describe how to use the Export Assistant to export your Oracle CRM On Demand data:

- Exporting Your Data (on page 783)
- Reviewing Export Results (on page 787)

Exporting Your Data

You can fully or partially export your company's data, including attachments for specific record types, from Oracle CRM On Demand to an external file. The export generates one or more ZIP files that contain individual CSV files for each record type you select to export. The generated export files are 1.5 GB each or smaller in size.

NOTE: If your company uses an industry-specific edition of Oracle CRM On Demand, then those record types that are specific to your industry, such as Households and Funds with their linked activities and notes, are excluded from the export. Also, if you export records for *recurring* opportunity products, then Oracle CRM On Demand populates the Parent_ID column for that row. For non-recurring records, the Parent_ID cell is empty.

About Limits for Partial Exports

Your company can perform one full export every seven days. For partial exports, the number of records that your company can export in a seven-day period is based on the number of user licences that your company purchases for Oracle CRM On Demand. For each licence, 1000 records can be exported in partial exports in a seven-day period.

The following examples show how the limit on partial exports works for a company that purchases five user licences for Oracle CRM On Demand and can therefore export a maximum of 5000 records in a seven-day period:

- **Example 1.** In the last seven days, 4000 records were exported through partial export requests. A user now submits a partial export request for 2000 records.

  In this case, the partial export request fails because the request would bring the total number of records exported within the seven-day period to 6000, which exceeds the limit of 5000 records.

- **Example 2.** In the last seven days, no records were exported through partial export requests. Two users now submit separate partial export requests. One of the export requests is for 3000 records, and the other is for 2000 records.

  In this case, both of the partial export requests succeed because the requests bring the total number of records exported within the seven-day period to 5000, which does not exceed the limit. However, any subsequent partial export requests that are submitted within the next seven days will fail because the limit of 5000 records for the seven-day period has already been reached.

NOTE: Records that are exported through List pages are not counted when Oracle CRM On Demand calculates the number of records exported through partial exports in a seven-day period.

About the Retention Period for Export Requests and Export Request Attachments

In the standard application, Oracle CRM On Demand retains the details of export requests and their output for a certain period, as follows:

- The details of an export request are retained for 60 days, and are then purged.
- The output from an export request is retained for 168 hours (that is, seven days), and is then purged.

The retention periods apply to export operations that are submitted through List pages, as well as to export operations that are submitted through the Data Export Assistant.

Your administrator can change the retention periods for export requests and their attachments, by changing the values in the following fields on the company profile:

- Export Request Expiry Days
- Export Request Attachment Expiry Days

For information about updating these fields, see Configuring Company Settings (on page 21).

Before you begin. To perform this procedure, your role must include the Admin Export privilege.

To export your company's data

1. In the upper right corner of any page, click the Admin global link.
2. In the Data Management Tools section of the Admin Homepage, click the Import and Export Tools link.
3. On the Import and Export Tools page, click the Export Data link.

   This starts the Data Export Assistant.
4. For Step 1:

   a. Perform one of the following:

      - If you wish to perform a full export, select the Export All Record Types radio button.
      - If you wish to perform a partial export, select the Export Selected Record Types radio button and the record types you wish to export. You can export all data for a record type or data for individual child records.
      - If you want to export the attachments for specific record types, then select these record types from the All Attachment Data section. For more information on exporting attachments, see Managing Your Company's Attachments (on page 816).

      NOTE: The exported attachment file has the following naming convention: <Object>_<ObjectRowId>_<ExportRequestId>.<FileExtension>, for example, Opportunity Attachment_AALA-3135W8_AALA-864XW0.pptx.

   b. Click Next.

   The data for parent and child record types is exported to a separate CSV file within the ZIP file.

CAUTION: If you are exporting Notes data in Oracle CRM On Demand, the CSV file contains all the public Notes created in Oracle CRM On Demand as well as the private Notes belonging to the user exporting the data.

5 For Step 2:

a Select the time zone used in the exported CSV file.

b Select the date/time format used in the exported CSV file.

NOTE: If you select dates for a full export, then the full export changes to a partial export.

c Select the type of CSV delimiter used in your file: comma or semi-colon.

d Select a time range filter to limit the data in your export.

NOTE: The first time you export your data, you might not want to filter on dates. After that, however, consider setting up incremental exports by filtering the data on dates since the previous export.

e Select the Enable Email Notification check box if you want an email notification to be sent after the export process is complete.

f Click the Export Attachment Details Only check box if you only want to export the attachment details, and if you do not want to export any attachment content. You can export the attachment details of all record types and their corresponding fields.

NOTE: This check box is only available if you selected a record type in the All Attachment Data section in the previous step.

g Select the Include Weblink URL in Export Files check box if you want URLs to be included in the exported CSV file.

The default value of the Include Weblink URL in Export Files check box is controlled by the Include Weblink URL in Export Files check box in the company profile. You can choose to select or to deselect this setting for each export request. For more information about this check box, see Configuring Integration Settings (see "Configuring Company Security Settings" on page 41).

h If you are exporting the attachments for one or more record types, and if you want the ZIP file of the attachments to be scanned for viruses, then make sure that the Scan export .zip file for viruses check box is selected.

When this check box is selected, the ZIP file of attachments is scanned for viruses and if any virus is found, the ZIP file is not exported.

This check box is selected by default. If you deselect the check box, then the ZIP file of attachments is not scanned for viruses and it is recommended that you use scanning software on your local machine to check the contents of the ZIP file after you download it.

NOTE: Each attachment is scanned for viruses before it is uploaded to Oracle CRM On Demand and if a virus is found, then the file is not uploaded. However, when you attempt to export attachments, a later version of a virus definition in the scanning software might result in a virus being detected that could not be detected at the time that the attachments were

uploaded. Also, a scan might occasionally return a result indicating that a virus is present even if no virus is present.

i Click Next.

6 For Step 3, review the summary, and click Finish to submit the export request.

7 On the Export Requested page, click the Export Request Queue link to check the status of your request.

The following table describes the possible export status values.

Status	Description
Queued	The export has not been processed yet.
Re-queued	The export request has been resubmitted to the queue.
In Progress	The export is being processed. If you cancel the export, then this status is changed to Cancelling and then to Cancelled.
Completing	All records have successfully exported. The export process is preparing the corresponding email, summary file, and ZIP file for download. This process might take from 30 seconds to a minute to complete.
Completed	The export completed with no errors.
Completed with errors	The export completed but there were some errors with some of the records.
Cancelling	If you cancel an export request with a status of Queued, then the export request is cancelled immediately. If you cancel an export request with a status of In Progress, then the status changes to Cancelling. Cancelling may take multiple minutes and if the export completes before it can be cancelled, then the final status changes to Completed. You can cancel the export request for either the parent request or the child requests. When you cancel the export request for the parent request, any exported child record types are available to download. However, any child record types that have not been exported are cancelled, and they are not available to download. When you cancel the export request for child requests, only the child record type export is

Status	Description
	cancelled, and it is not available to download. You can continue to download other child record types under the parent export request.
Cancelled	After the export request is completely cancelled, the status changes to Cancelled.
Failed	The export was completed, but none of the records were exported.
Error	The export did not complete because an error occurred. For more information about troubleshooting errors when exporting your data in Oracle CRM On Demand, see 1802395.1 (Article ID) on My Oracle Support.

For more information about the Export Request Queue page, see Reviewing Export Results (on page 787).

Reviewing Export Results

The Export Request Queue page displays all of the pending and completed export requests that were submitted through the Data Export Assistant. If a request is in the Pending Requests section, then you can click Refresh to see if the request has completed. When the request has completed, you can drill down on a request to retrieve the output file.

NOTE: The Export Request Queue page does not show the export requests that were submitted through List pages. However, if your user role has the Access Master Export Requests privilege, then you can view all export requests, including the requests that were submitted through List pages, in the Master Export Request Queue page. For more information, see Reviewing All Export Requests for Your Company (on page 83).

About the Retention Period for Export Requests and Export Request Attachments

In the standard application, Oracle CRM On Demand retains the details of export requests and their output for a certain period, as follows:

- The details of an export request are retained for 60 days, and are then purged.
- The output from an export request is retained for 168 hours (that is, seven days), and is then purged.

The retention periods apply to export operations that are submitted through List pages, as well as to export operations that are submitted through the Data Export Assistant.

Your administrator can change the retention periods for export requests and their attachments, by changing the values in the following fields on the company profile:

- Export Request Expiry Days
- Export Request Attachment Expiry Days

For information about updating these fields, see Configuring Company Settings (on page 21).

The following procedure describes how to view export requests.

Before you begin: To perform this procedure, your user role must have the Admin Export privilege.

To view export requests

1. In the upper right corner of any page, click the Admin global link.
2. In the Data Management Tools section, click the Import and Export Tools link.
3. On the Import and Export Tools page, click the Export Request Queue link.

   The Export Request Queue page appears, showing the details of the export requests. The following table describes the export request information.

Export Record Information	Description
Export Type	The type of export: ■ **Full.** A full export of your company's data. ■ **Partial.** A partial export of your company's data.
Record Type	The record type. For partial requests that include child records, the child record is indicated in the format *Parent*:*Child*, for example, Account:Contact.
Status	The status, for example, In Progress or Completed.
Requested By	The user who submitted the request.
Submitted	The time and date when the export request was submitted.
Enable Email Notification	If this check box is selected, then an email notification is sent when the export process is completed.
Completed	The time and date when the export was finished.

The following procedure describes how to review the details of an export request.

To review the details of an export request

- In the row for the request, click the Export Type or Record Type link to open the Export Request Details page.

  The page displays the export properties, including the number of records exported (# Exported) and the number of record types successfully exported without any problems (# Completed Objects). In the Export Record Types section of the page, you can see details of the number of records that were exported for each record type.

For information about downloading and deleting export request attachments, that is, the ZIP files that contain the output from the export requests, see Downloading and Deleting Export Request Attachments.

NOTE: To download the export request attachments for export operations performed by all users, your user role must have the Access all Export Request Attachments privilege. If your user role does not have this privilege, then you can download only the attachments for the export operations that were performed by you or your subordinates.

Oracle Data Loader On Demand Client Utility

The following topics describe how to use the Oracle Data Loader On Demand client to import your Oracle CRM On Demand data:

- About the Oracle Data Loader On Demand Client Utility (on page 789)
- Downloading the Oracle Data Loader On Demand Client Utility (on page 789)

About the Oracle Data Loader On Demand Client Utility

The Oracle Data Loader On Demand client is a command-line utility, which provides a means of importing data into Oracle CRM On Demand from external data sources. It has two functions:

- **Insert function.** This function takes records from a file and adds them to Oracle CRM On Demand.
- **Update function.** This function modifies existing records in Oracle CRM On Demand, using records from an external data source.

For more information, see Oracle Data Loader On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

Downloading the Oracle Data Loader On Demand Client Utility

Complete the following procedure to download this utility. To install and use this utility, see Oracle Data Loader On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

To download the Oracle Data Loader On Demand utility

1. Sign in to Oracle CRM On Demand, and click Admin.
2. Under Data Management Tools, click Import and Export Tools.
3. Under Oracle Data Loader On Demand, click Oracle Data Loader On Demand.
4. Save the ZIP file to your computer.

Web Services Integration

Oracle CRM On Demand allows you to:

- Access and change your Oracle CRM On Demand data from a Web services-enabled application
- Create your own applications that integrate with Oracle CRM On Demand

You can:

- Download Web Services Description Language (WSDL) files to help you develop applications that access Oracle CRM On Demand using the Web services interface, see Downloading WSDL and Schema Files (on page 790).
- Download WSDL and Schema files for using the methods of the Integration Events Web service to access the integration queues, and track changes for particular record types. You can also download Schema files to track custom and renamed fields for the supported record types.
- View a summary of Web services used by your company, see Reviewing Web Services Utilisation (on page 793).

CTI Integration API

One of the WSDL files available from the Web Services Administration page is for the CTI Activity Web service, which is part of the computer telephony integration (CTI) Integration application programming interfaces (API). The CTI Integration API provides the ability to integrate Oracle CRM On Demand directly with third-party CTI software by using Web service integration. For more information about the CTI Integration API, see Oracle CRM On Demand CTI Developer's Guide.

Downloading WSDL and Schema Files

The Web services provided by Oracle CRM On Demand allow users of client applications to interact with Oracle CRM On Demand, for example, to insert, update, delete, and query records and to perform a number of administrative tasks.

The Web services are available through:

- **Web Services v1.0.** Used to interact with Custom Objects 01-03, as well as preconfigured objects.
- **Web Services v2.0.** Used to interact with all Oracle CRM On Demand custom objects, as well as preconfigured objects, as well as their custom Web applets. Compared to Web Services version 1.0, the Web Services version 2.0 API also offers additional options for issuing queries, using the QueryPage method.
- **Service APIs.** Used to manage administrative tasks through Web services. For example, service APIs allow the administration of users in Oracle CRM On Demand, and provide the ability to issue queries for system and usage information in relation to Oracle CRM On Demand.
- **Administrative Services**. Used to interact with Oracle CRM On Demand metadata through Web services. Administrative Services provides the capability of reading and loading Oracle CRM On Demand metadata in an XML format.

From the Web Services Administration page you can:

- Download the Web Services Description Language (WSDL) files used by applications that access the Web services

- Download schema files
- Access the Web services documentation

Downloading WSDL Files for Web Services v1.0 and Web Services v2.0

You can download a WSDL file for each record type and you can choose the child record types to include in the WSDL file for the parent record type.

To download a WSDL file for Web Services v1.0 and Web Services v2.0

1. In the upper right corner of any page, click the Admin global link.
2. In the Web Service Integration section, click Web Services Administration.
3. From the Select Service list, select Web Services v1.0 or Web Services v2.0 as required.
4. From the Document list, select WSDL.
5. From the Type list, select Custom or Generic.

   Depending on whether you select Custom or Generic, custom fields are displayed differently in the WSDL. For Custom WSDL, the XML tags for the custom fields are based on the Integration tags from Field Set-up, see Setting Up Custom Field Integration Tags (on page 138). Custom WSDL allows you to generate WSDL that is specific to your company and that uses your company's field-naming conventions.

   For Generic WSDL, the custom fields are based on generic XML tags: CustomNumber0, CustomCurrency0 and so on. Using these placeholders together with the Mapping Service allows applications to map to the field names that your company uses.
6. From the WSDL Object list, select the required record type, for example, Account.

   The objects displayed in the WSDL Object list depend on the record types that are set up for your company. All of the child record types for the selected record type are displayed, in alphabetical order, in the Available Related Information list, regardless of whether you have access to the child record types. For Web Services v2.0, CustomWebApplet is also displayed.
7. Move the child record types that you wish to include in the WSDL from the Available Related Information list to the Selected Related Information list.
8. Click the Download button.
9. Save the WSDL file to your computer.

Downloading WSDL Files for Service APIs

You can download WSDL files for each of the service APIs. If you download the WSDL for Integration Event, you must additionally download the Schema files for each of the record types for which you wish to generate integration events, see the "Downloading Schema Files for Integration Events" section.

To download a WSDL file for Service APIs

1. In the upper right corner of any page, click the Admin global link.
2. In the Web Service Integration section, click Web Services Administration.
3. From the Select Service list, select Service APIs.

   NOTE: If you select the Merge Service API, you can select Custom or Generic from the Type list and download a Schema file for this Service API.
4. From the Type list, select Custom or Generic.
5. From the WSDL Object list, select the required name of the Service API.
6. Click the Download button.
7. Save the WSDL file to your computer.

Downloading WSDL Files for Administrative Services

You can download WSDL files for each Administrative service.

NOTE: To download the Assessments Scripts WSDL or the Access Profile WSDL, your user role must include the Manage Roles and Access privilege.

To download a WSDL file for Administrative Services

1. In the upper right corner of any page, click the Admin global link.
2. In the Web Service Integration section, click Web Services Administration.
3. From the Select Service list, select Administrative Services.
4. From the WSDL Object list, select the required service..
5. Click the Download button.
6. Save the WSDL file to your computer.

Downloading Schema Files for Integration Events

The Integration Events Web service uses Schema (XSD) files in its WSDL, which you download in addition to the integrationevents.wsdl file. The WSDL file contains placeholders for the XSD schema files of all record types for which your company currently has active integration event actions defined. Generic Schema files are available. However, if you create custom fields or rename fields for a record type, then you must download a Custom Schema. For more information about the Integration Events Web service, see *Oracle Web Services On Demand Guide*.

To download a Schema file for integration events

1. In the upper right corner of any page, click the Admin global link.
2. In the Web Service Integration section, click Web Services Administration.
3. From the Select Service list, select Web Services v1.0 or Web Services v2.0.
4. From the Document list, select Schema.
5. From the Type list, select Custom or Generic.

   Depending on whether you select Custom or Generic, custom fields are displayed differently in the Schema file. For Custom Schema, the XML tags for the custom fields are based on the integration tags from Field Set-up. For Generic Schema, the custom fields are based on generic XML tags.
6. From the WSDL Object list, select the required record type, for example, Account.

   The objects displayed in the WSDL Object list depend on the record types that are set up for your company.
7. From the Select Related Information list, select the child record types that you wish to include in the Schema.
8. Click the Download button.
9. Save the Schema file to your computer.

Accessing the Web Services Documentation

To access the Web services documentation, click Release Documentation in the title bar on the Web Services Administration page. The Oracle CRM On Demand Documentation page is displayed from which you can access the Web services and other documentation for different Oracle CRM On Demand releases.

Reviewing Web Services Utilisation

From the Web Services Utilisation Page, you can review a summary of the Web services used by your company. By default, the Web service requests are listed by session ID. The Web Service client Name, Web Service name, operation, number of operations, start time, end time, and user alias for the session are displayed. The following table describes what you can do from the Web Services Utilisation page.

To do this	Follow these steps
Create a new list of Web Service requests	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in Creating and Refining Lists.
Display details of a Web service request	Click the session ID to display a detail page for the Web service request.
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists.
Find a Web Service	Select the required filter criteria in the drop-down lists next to Show results

To do this	Follow these steps
request	where.
Manage all the Web Service request lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task as described in Manage Lists Page.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in Creating and Refining Lists.
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page.
Sort the Web service requests in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to be seen at any one time.
View a subset of Web services operations	Click the drop-down list in the title bar and change the selection as required: ■ **All**. Displays a list of all Web services operations ■ **All Operations Today.** Displays a list of all Web services operations for today

About Creating a Web Services List

The process for creating or refining a Web services list is similar to that described in Creating and Refining Lists. However, the Web Service List pages do not have the Search In section that is provided on the corresponding pages for other record types.

The fields that you can use for filtering a Web services list, and which you can select for display in the search results are as follows:

Field	Description
End Time	The end time of the Web service request.
Entry Type	Possible values are: Login, Logout and Dispatch. Every Web service call, apart from login and logout, is set to Dispatch for this field because the calls go through the Inbound Web service Dispatcher business service.
Input Message Size (Bytes)	The size of the input message in bytes.
Operation	The operation for the Web service request.

Field	Description
# of Operations	The number of operations in the Web service request.
Output Message Size (Bytes)	The size of the output message in bytes.
Session ID	The session identifier of the Web service request. This is actually the foreign key for the corresponding session in the login history table, and not the actual session ID used in the Web service request.
Start Time	The start time of the Web service request.
User Alias	The user alias of the user who executed the Web service request.
Type	The user agent value for the request. For non-Oracle client integrations, this value defaults to Web Services.
Web Service Client Name	The name of the Web service client from which the request was made.
Web Service Name	The name of the Web service to which the request was made.
Web Service Space	The namespace used in the request.

Oracle Migration Tool On Demand Client Utility

The following topics describe how to use the Oracle Migration Tool On Demand client to export your Oracle CRM On Demand data:

- About the Oracle Migration Tool On Demand Client Utility (on page 795)
- Downloading the Oracle Migration Tool On Demand Client Utility (on page 796)

About the Oracle Migration Tool On Demand Client Utility

The Oracle Migration Tool On Demand client is a command-line utility, which eliminates the need to copy customised configurations manually from one Oracle CRM On Demand environment to another environment. For example, you might want to copy customised configurations from a customer test environment to a production environment. You can use this client utility with the Administration Services, which is a set of administration Web services, to automate the administration of your company's configurations. This client utility enables you to extract and import specific configuration information directly to and from your computer. You can import the configurations immediately or in batch mode. The Administration Services enable client applications to access the configurations. You can import the following configurations:

- Access profiles
- Action bars
- Assignment rules and rule groups
- Cascading picklists

- Concatenated fields
- Custom HTML head tag additions
- Custom record types
- Custom Web applets
- Custom Web links
- Custom Web tabs
- Field audit set-up
- Field management definitions
- Homepage layouts
- Integration event queues
- List access and order settings
- Modification tracking settings
- Page layouts
- Picklists
- Picklist value groups
- Process administration
- Related information layouts
- Role associations for report folders
- Roles
- Sales assessment templates
- Sales categories
- Search layouts
- Workflow rules and action sets

Downloading the Oracle Migration Tool On Demand Client Utility

Complete the following procedure to download the client utility, and follow the steps in Oracle Migration Tool On Demand Guide to install, configure, and use this client utility. Oracle Migration Tool On Demand Guide is available from the Oracle CRM On Demand documentation library (see Oracle CRM On Demand documentation library - http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html) on Oracle Technology Network. For information on downloading the Web Services Description Language (WSDL) that you require to access the Administrative Services, see Downloading WSDL and Schema Files (on page 790). For information about the APIs provided by the Administrative Services, see Oracle Web Services On Demand Guide, which is available from the Oracle CRM On Demand documentation library (see Oracle CRM On Demand documentation library - http://www.oracle.com/technetwork/documentation/siebelcrmod-096050.html) on Oracle Technology Network.

To download the Oracle Migration Tool On Demand client utility

1. Create a directory on your computer in which to extract the Oracle Migration Tool On Demand 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 to your computer.

Batch Delete and Restore Queue Page

The Batch Delete and Restore Queue page displays the active and completed batch delete and restore requests submitted by your company. The following requests are displayed:

- Active and completed batch delete requests that were performed through the Batch Delete option on List pages.
- Completed delete requests that were submitted through Web services with the AvailableForBatchRestore element in the request set to true. If a Web services request deletes child records as well as parent records, then there are separate request records for each record type.
- Active and completed restore requests that were performed from the Batch Delete and Restore Queue page.

Before you begin. To view all batch delete and restore requests on this page, your user role must include the Batch Delete and Restore privilege. To restore lists of records that you deleted, your user role must include the Batch Delete and Restore privilege. To restore lists of records that were deleted by another user, your user role must include the Recover All Records privilege as well as the Batch Delete and Restore privilege.

From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps
Cancel an active request	When you delete or restore a list of records, you receive a confirmation email stating that Oracle CRM On Demand has successfully prepared the batch delete or restore request on the Batch Delete and Restore Queue page. You can click the Cancel link to cancel the request up until you click the Proceed link beside the request and Oracle CRM On Demand begins to process the request.
Proceed the active request	Click the Proceed link next to the request to finalise the batch delete or restore request. You receive a confirmation email stating that the batch delete or restore request has been

To Do This	Follow These Steps
	completed and that the list of records is deleted or restored.
Display the number of records	In the Number of Records Displayed drop-down list, select a number of requests to see at one time.
Delete the processed request	Click the Delete link to delete the batch delete or restore request from the Processed Requests queue. **NOTE:** If a processed batch delete request has not been restored, that is, the status is Deleted, then the request cannot be restored in the future.
Show a summary of the completed request	You can do one of the following: ■ Click the View Delete Log link to see the summary log for delete requests. ■ Click the View Restore Log link to see the summary log for restore requests.
Restore the deleted records	Click the Restore link next to the delete request to restore the deleted records that have not been purged from Oracle CRM On Demand.

To Do This	Follow These Steps
Expand the list of processed requests	If a processed request is not shown in the Batch Delete and Restore Queue page, then you can expand the list of requests by clicking Show Full List. The list of requests opens in the Data Management Request List page. In that page, you can search for a request and you can also use the list features to help you to find the request that you want. In the title bar of the page, click Menu, and then select the option for the task that you want to perform, as follows: ■ **Export List.** Export the list to a file, see Exporting Records in Lists. ■ **Record Count.** Count the records in the list, see Counting Records in Lists. ■ **Refine List.** Refine the list, see Creating and Refining Lists. For example, you can change the list filter, select different fields to display, or change the sort order for the list. ■ **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list. ■ **Show List Filter.** View the filter that is currently defined for the list. ■ **Create New List.** Create a new filtered list, see Creating and Refining Lists. ■ **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page.

Batch Assign Book Queue Page

The Batch Assign Book Queue page displays all the active and completed book assignment requests submitted by your company. From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps

To Do This	Follow These Steps
Cancel	Click the Cancel link next to the request. You can cancel a request until its status changes to 'In Progress'.
Display details of a request	Drill down on the list name for the request. On the request Detail page, you can view the request properties and request parameters.
Show more or fewer requests	In the Number of Records Displayed drop-down list, select the number of requests to see at one time.
Delete the processed request	Click the Delete link to delete the request from the Processed Requests queue.
Log	Click the Log link to save the request as a log file.

When the request has completed, you receive an email notification.

For information on creating batch assignment requests, see Assigning Records to Books (on page 378).

Related Field Initialisation Queue Page

When you save a new custom related information field, Oracle CRM On Demand automatically submits a request to initialise the new field. The initialisation process populates the custom related information field on the records with the value of the corresponding field in the records of the related record type. The Related Field Initialisation Queue page displays the active and completed requests to initialise custom related information fields. From this page, you can perform the tasks shown in the following table.

To Do This	Follow These Steps
Log	Click the Log link to view the status of the initialisation request.
Delete the processed request	Click the Delete link to delete the request from the Processed Requests queue.
Resubmit	If the request to initialise the custom related information field failed, then you can click Resubmit to start the initialisation process again. If the request completed successfully, then the Resubmit option is not available.

Related Topics

See the following topics for related information:

- About Custom Related Information Fields (on page 132)

- Creating Custom Related Information Fields (on page 134)

About Integration Events

An *integration event* is a mechanism for triggering external processes based on specific changes (create, update, delete, associate, dissociate) to the records in Oracle CRM On Demand. Integration events contain information about the data that was changed by the user. This information is stored in one or more integration event queues as an XML file, which allows the details of events in Oracle CRM On Demand to be accessed by external applications. For example, an external application might need to track Account changes in Oracle CRM On Demand and trigger local updates accordingly.

For customers who require multiple applications to integrate with Oracle CRM On Demand independently, the company administrator can define multiple integration event queues. Using the integration event functionality, the same event can be generated for multiple queues, and the external applications are guaranteed queue integrity, because the external applications can be configured to request only the events from a specific queue.

About Setting Up Integration Event Administration

If you are a new customer, then the integration event functionality is automatically enabled. However, if you are an existing customer, then the Oracle CRM On Demand integration event functionality must be configured by Oracle CRM On Demand Customer Care and by your company administrator. Contact Oracle CRM On Demand Customer Care to request support for Integration Event Administration and to specify the maximum total size of the integration event queues.

Note: The maximum size of the integration queues is not displayed on your Company Profile page.

When Oracle CRM On Demand Customer Care has set up the integration event functionality, the Integration Event Administration link is visible in the Data Management Tools section of the Admin Homepage. Also, the Administrator user role has the Enable Integration Event Access privilege enabled. For more information about user roles, see Adding Roles (on page 309).

About Creating, Storing, and Accessing Integration Events

To trigger the creation of integration events, you must create workflow rules with Create Integration Event actions. For each such action, you can specify which fields on a record are to be tracked. When the value changes in a tracked field, the change is recorded in an integration event. You can also specify to which queues the integration events are written. For more information about workflow rules, see About Workflow Rules (on page 423).

Integration events are stored in one or more queues, the maximum total size of which is specified for your company by the Customer Care representative. A default integration event queue is provided, and you can create additional queues.

When a queue is full, any new integration events are not stored. When the number of integration events in the queue is again below the maximum, new events will once again be added to the queue.

On the Integration Event Settings page, you can delete integration events from a queue. You can also configure Oracle CRM On Demand to send a warning email to a specified address when the queue is full, or when the number of integration events in the queue exceeds a number that you specify.

You can disable integration event queues, including the default queue, but you cannot delete a queue.

External applications access the integration event queues by using the Integration Events Web service, which has two methods:

- **GetEvents**. Retrieves integration events from a queue.
- **DeleteEvents**. Deletes integration events from a queue.

For information about downloading the Web Services Description Language (WSDL) file for the Integration Events Web service, see Web Services Integration (on page 790). For more information about the Integration Events Web service, see Oracle Web Services On Demand Guide.

Sometimes an integration event queue can contain events that a client application cannot process. For information about how to handle such bad events, see Oracle Web Services On Demand Guide.

- For a step-by-step procedure for creating an integration event queue, see Creating Integration Event Queues (on page 802).
- For a step-by-step procedure to manage the integration event queues, see Managing Integration Event Settings (on page 803).
- For a step-by-step procedure to create workflow rules that trigger integration events, see Creating Workflow Rules (on page 446).

Creating Integration Event Queues

When Integration Event support is enabled, a default integration event queue is provided with Oracle CRM On Demand. However, you can also create additional queues and specify to which queues individual integration events are written.

Before you begin. Integration Event Administration must be set up for your company, as described in About Integration Events (on page 801). When Integration Event Administration is set up, the maximum number of integration events allowed in the queues is configured as part of your company profile. To perform the following procedure, your user role must have the Enable Integration Event Access privilege.

To create an integration event queue

1. In the upper right corner of any page, click the Admin global link.
2. In the Data Management Tools section, click the Integration Event Administration link.
3. On the Integration Event Administration page, click the Integration Event Queue Management link.
4. On the Integration Queue Management page, click New Queue.
5. On the Integration Event Queue Settings Page, complete the following fields, and click Save.

Field	Comments
Queue Name	Enter the name for the queue. Required field.

Field	Comments
Description	Enter a description of the usage of the queue.
Disabled	Ensure that this check box is deselected.
Queue Size	Enter the size of the queue. This size cannot exceed the size shown in the Unassigned Queue Capacity field. Required field. The Integration Event File Limit field shows the total number of events that the company can store for all queues. If the size of the existing queues matches this number, you cannot create a new queue.
Notification Email Address	Enter an email address if a warning email is to be sent when the queue is full or when the queue reaches a certain size.
Send Warning Email When The Number Of Queued Transactions Reaches	Specify the size that the queue is allowed to reach before a warning email is sent to the address specified in the Notification Email Address field.
Picklist Format	This field is required. Select the format for recording picklist field values in the integration events, as follows: ■ If you want the values to be recorded as language-independent code (LIC) values, then select Language Independent Values. **NOTE:** The LIC values in picklists are usually the same as the values in the English-United States (ENU) locale. ■ If you want the values to be recorded in the language of the user whose action causes the integration event to be created, then select User Language. **NOTE:** After you create the queue, the Picklist Format field becomes read-only and you cannot change it. 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.

Managing Integration Event Settings

You can edit the settings for all of the integration event queues.

Before you begin. Integration Event Administration must be set up for your company, as described in About Integration Events (on page 801). When Integration Event Administration is set up, the maximum number of

integration events allowed in the queue is configured as part of your company profile. To perform the procedures described here, you must have the Enable Integration Event Access privilege in your user role.

To manage integration event settings

1. In the upper right corner of any page, click the Admin global link.
2. In the Data Management Tools section, click the Integration Event Administration link.
3. On the Integration Event Administration page, click the Integration Event Queue Management link.
4. On the Integration Queue Management page, click the Edit link for the queue.
5. On the Integration Event Queue Settings page, you can perform the following tasks:

Task	Action
Disable a queue.	Select Disabled to disable all queues, including the default queue.
Update the size of a queue.	Enter a value in the Queue Size field. This size cannot exceed the size shown in the Unassigned Queue Capacity field. The Integration Event File Limit field shows the total number of events that the company can store for all queues. If the size of the existing queues matches this number, you cannot increase the size of the queue.
Delete transactions from a queue.	To delete all transactions in the queue, select the When I Click Save, Clear All Transactions check box, and then click Save to delete the transactions. To Delete older transactions, click the calendar icon, and select a date in the When I Click Save, Clear Transactions Older Than field. Click Save to delete the transactions.
Configure Oracle CRM On Demand to send a warning email when the queue is full or when the queue reaches a certain size.	Enter the email address, and (optionally) specify the size that the queue is allowed to reach before the warning email is sent. Click Save to save the email configuration.
Specify how the values of the Date and Time fields (for example, ModifiedDate, CreatedDate) are recorded in the integration events.	Select a value from the Time Zone field: ■ **UTC Format.** If you select this value, 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

Task	Action
	corresponds to June 12th 2017, 9:44:15 GMT. **NOTE:** Fractions of seconds are not recorded. ■ **UTC.** If you select this value, 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 you select this value, 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. If you leave the Time Zone field blank, then the date and time in the time zone of the user who updated the record are recorded, in the format shown above for the User Time Zone value. After you change the value in the Time Zone field, users must sign out of all Oracle CRM On Demand sessions, including Web services sessions, and then sign in again for the new setting to be used. **NOTE:** You set the Time Zone field for the default queue only. All other queues inherit the setting that is selected for the company's default queue. The Time Zone field is displayed for all queues, but it is read-only for queues other than the default queue.

NOTE: The Picklist Format field determines the format for recording the values in picklist fields in integration events that are written to the queue. The values can be recorded in the language of the user whose action causes the integration event to be created, or as language-independent code (LIC) values.

After you create an integration event queue, the Picklist Format field becomes read-only and you cannot change it. If you want to change the picklist format for an integration event queue, including the default queue, then contact Oracle CRM On Demand Customer Care and ask them to change it for you. After Oracle CRM On Demand Customer Care changes the format for the picklist values for a queue, the change applies only to the picklist values in the integration events that are created after the format is changed. Changing the picklist format for a queue does not change the format of the picklist values in any integration events that already exist in the queue.

Content Management

Companies often want to keep track of the products in which their customers express interest and which they subsequently purchase. To help your company's employees track product information, you can set up a product catalogue. Setting up the product catalogue consists of grouping products under categories (if required) and then setting up the products under each category. Products include recurring or one-time products, services and training options.

The following sections describe ways in which tracking of products is useful in Oracle CRM On Demand:

Opportunities

A sales representative working on a sales opportunity can create an opportunity record to track the details of a customer's interests, including the potential revenue for the deal. A customer might be interested in several products and might consider purchasing a service contract as well. The sales representative can scroll down to the Products section of the opportunity record to link the product records for each of the items that the customer might buy. For the service contract, invoiced monthly, the sales representative can also record recurring revenue information. In this way, the opportunity record provides complete information about a potential deal, and allows your company to:

- Track the products belonging to each opportunity
- Calculate revenue streams generated over time based on those products (recurring and non-recurring products)

Assets

Both sales and service professionals find it helpful to know which of your company's products and services a customer has already purchased. In Oracle CRM On Demand, you can track purchased products or assets by linking product records to a customer’s account or contact record.

Forecasts

A forecast is a periodic snapshot of sales performance compiled from individual opportunity or product records. An advantage of linking products to opportunity, account or contact records is that a company can then determine whether to generate forecasts based on product and recurring revenue.

If your company bases its forecasting on product revenue rather than opportunity revenue, your employees can specify which products should be used for the forecast totals.

Click a topic to see step-by-step instructions for the procedures pertaining to Content Management:

- Setting Up Product Categories (on page 807)
- Setting Up Company Products (on page 807)
- Setting Up Price Lists for PRM (on page 810)
- Setting Up Price Lists for Life Sciences (on page 813)
- Managing Your Company's Attachments (on page 816)
- Managing Detail Page Images (on page 818)
- Setting Up Assessment Scripts (on page 819)

Setting Up Product Categories

If your company's product list is long, it is a good idea to organise products in logical groupings, each with a name that is meaningful at your company. These groupings are called product categories. Categories help you search for a product or set of products because they allow you to sort the list to quickly find what you need. The product categories also allow your employees to quickly identify the correct product to link to their opportunities. For example, an office equipment company might set up these categories: Copiers, Fax Machines, Service, and Supplies.

You can have as many categories and subcategories (children) as you want.

Before you begin:

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If your product categories have not been defined at your company, determine the categories and subcategories before setting up the information in Oracle CRM On Demand. When entering information, start from the top parent categories, and then add the children categories.

To set up your product categories

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click the Content Management link.
3. Click the Product Categories link.
4. On the Product Categories List page, do one of the following:
   - To add a category, click New.
   - To update category information, click Edit for the appropriate record.

     NOTE: To limit the records displayed on this page (and make it easier to find the existing category), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.
   - To add a child category to an existing category, click the link in the Category Name column, and then click New in the Child Categories section.
5. On the Category Edit page, enter the required information. The Category Name character limit is 100.
6. Save the record.

Setting Up Company Products

Before you begin:

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If you are grouping products under categories, set up the categories before you define your products.

To allow employees to link products to opportunities, you need to set up your product inventory. When defining the products, mark the ones that you want to be on the list of products that your employees can order from (so that they can link products to their opportunities).

NOTE: You can display an image on the Product Detail page; for example, you might want to display a photograph of the product or the product packaging. For more information, see Displaying Images on Record Detail Pages.

To add products

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click the Content Management link.
3. In the Product Catalogue section, click the Products link.
4. On the Product List page, perform one of the following:
   - To add a product, click New.
   - To update product information, click Edit for the required record.

     NOTE: To limit the records displayed on this page (and to make it easier to find the existing product), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists that you or your managers created.
5. On the Product Edit page, complete the information and save the record.

   NOTE: To make the product available to employees (so they can link it to their opportunities), make sure the Orderable checkbox is selected.

   TIP: You cannot delete products. Instead, you need to make the product inactive by clearing the Orderable check box. This removes the product from the list of products that your employees can select.

   The following table describes field information for products. Company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table. (For additional information on product fields see Product Fields.)

Field	Description
Key Product Information	
Product Category	Specific to Oracle CRM On Demand Financial Services Edition and Oracle CRM On Demand Life Sciences Edition.
Class	Grouping of products to which the product belongs. Specific to Oracle CRM On Demand Life Sciences Edition.
Price Type	Specific to Oracle CRM On Demand Life Sciences Edition.

Field	Description
Parent Product	Specific to Oracle CRM On Demand Life Sciences Edition.
Product Type	Specific to Oracle CRM On Demand Automotive Edition and Oracle CRM On Demand Life Sciences Edition. If you are defining an Automotive product, the Product Type field must be set to Vehicle. If you are defining a Sample Drop product (where Type is set to Sample), the Product Type field must be set to Sample or remain empty.
Therapeutic Class	Specific to Oracle CRM On Demand Life Sciences Edition.
Part #	The part number for the product.
Orderable	Select this check box so that the product can be linked to any other record, appears in the Product Lookup window, in lists, and is available in Action bar search and advanced search. If this check box is deselected, the product appears when using the Action bar search or the advanced search only.
Type	The type of product, which can be one of the following: Product, Service, Training, Market, Competitor, Detail, Sample, or Promotional Item. For Oracle CRM On Demand Life Sciences Edition, you must select the following values for Type: ■ Detail, if the item is a Product Detail ■ Sample, if the item is a Sample Drop ■ Promotional Item, if the item is a Promotional Item Drop Selecting these types, filters the type of products (product details, samples, or promotional items) that are visible in the sales representative's Sample Drop, Product Detail or Promotional Items pick lists. **NOTE:** If the Type is Sample, the Product Type field must also be set to Sample or remain empty.
Sub Type	Specific to Oracle CRM On Demand Life Sciences Edition.
Status	The status of the product.
Revision	Specific to Oracle CRM On Demand Life Sciences Edition.
Serialised	Specific to Oracle CRM On Demand Life Sciences Edition.
Lot Number Tracking	Specific to Oracle CRM On Demand Life Sciences Edition.
Controlled	Indicator that the product is controlled. Specific to Oracle CRM On Demand Life Sciences Edition.

Field	Description
Additional Information	
Description	Additional information about the product. This field has a limit of 255 characters.

Setting Up Price Lists for PRM

Brand owners can maintain and publish price lists for their products, so that partners can use them when creating special pricing requests. Brand owner administrators can create multiple price lists and can associate each account or partner organisation with one of them. Multiple products can be assigned to a price list and given a specific price.

On a special pricing request, the customer price list determines the Manufacturer's Suggested Retail Price (MSRP) of the products, and the owner partner price list determines the reseller purchase cost. Maintaining these prices in price lists streamlines administration and facilitates the special pricing process.

Before you begin: To perform the procedures described in this topic, your role must include the Manage Content privilege.

NOTE: Access to price lists is restricted to brand owner administrators who have the Manage PRM Access privilege in their role.

To set up a price list

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click Content Management.
3. In the Product Catalogue section, click Price Lists.
4. On the Price List List page, do one of the following:
   - To add a price list, click New.
   - To update price list information, click the Edit link for the price list.

     NOTE: To limit the records displayed on this page, click the menu in the title bar, and change the selection. The list contains the standard lists distributed with Oracle CRM On Demand along with the lists that you or your managers created.
5. On the Price List Edit page, complete the information.

The following table describes the fields for price lists. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Price List Information	

Field	Description
Price List Name	The name of the price list.
Effective From	The date that begins the effective period during which the price list is valid.
Effective To	The date that ends the effective period during which the price list is valid. If this field is empty, then the price list is effective indefinitely.
Type	The type of price list. The following values are available by default: ■ **DIST COST.** The distributors' costs, which are the original stocking costs that the partner or reseller must pay to purchase products from the brand owner. ■ **MSRP.** The Manufacturer's Suggested Retail Prices, which are the prices that the brand owner recommends for products sold to customers. Your company can add values to the picklist for the Type field. However, the values provided by default must not be changed. If they are changed, then the corresponding fields on the special pricing requests will not be populated using the price lists.
Status	The current status of the price list (In Progress or Published). The default value for all new price lists is In Progress. When a price list can be made available to users, change its status to Published.
Currency	The type of currency used by the price list. All prices in a price list are in the same currency, which is defined when the price list is created. When you save the new price list record, this field becomes read-only.
Additional Information	
Created	The name of the person who created the price list, as well as the date and time when the price list was created.
Modified	The name of the person who last modified the price list, as well as the date and time when the price list was most recently modified.
Description	Additional information about the price list. This field has a limit of 2,000 characters.

Publishing Price Lists

After a price list has been updated by the administrator, it can be published to users and used when creating special pricing requests.

To publish a price list

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

2 In the Content Management section, click Content Management.

3 In the Product Catalogue section, click Price Lists.

4 Click the Edit link for the price list that you want to publish.

5 On the Price List Edit page, choose Published from the Status menu.

6 Click Save.

When you change the status to Published, the following occurs:

- The price list can be associated with an account or partner organisation.
- If the price list has been associated with a customer or partner on a special pricing request, then when a special pricing product is created, the price list is used to populate the Manufacturer's Suggested Retail Price (MSRP) field and the Purchase Cost field on the special pricing product.

  The price list associated with the end customer on the special pricing request is used for the MSRP field and the price list associated with the owner partner on the special pricing request is used for the Purchase Cost field. The following conditions must also be met:

  - The price list associated with the end customer is of type MSRP and the price list associated with the owner partner is of type DIST COST.
  - The status of the price list is Published.
  - The product that is added on the special pricing request exists on the price list.
  - The start date of the special pricing request falls between the Effective From date and the Effective To date of the price list and between the Effective From date and the Effective To date of the price list line item.

Adding Price List Line Items

After creating a price list you can add products as line items for the price list. A price list can contain multiple products, but each product can be listed only one time in any given price list.

To add a price list line item

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

2 In the Content Management section, click Content Management.

3 In the Product Catalogue section, click Price Lists.

4 Click the name of the price list that you want to update.

5 On the Price List Detail page, in the Price List Line Items related information section, click Add.

6 On the Price List Line Item Edit page, complete the information.

NOTE: You can also access the Price List Line Item Edit page from a Product Edit page.

The following table describes the fields for price list line items. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Price List Information	
Price List	The name of the price list.
Product	The product for the price list line item.
Effective From	The date that begins the effective period during which the indicated price list line item is valid. This date must be within the Effective From and Effective To dates for the price list.
Effective To	The date that ends the effective period during which the indicated price list line item is valid. If this field is empty, then the price list line item is effective indefinitely.
Price Type	Denotes the type of the price. The current default value is Standard.
List Price	The price for the line item during the indicated effective period.
Additional Information	
Created	The name of the person who created the price list line item, as well as the date and time when the price list line item was created.
Modified	The name of the person who last modified the price list line item, as well as the date and time when the price list line item was most recently modified.
Description	Additional information about the price list line item. This field has a limit of 2,000 characters.

Setting Up Price Lists for Life Sciences

Companies that use Oracle CRM On Demand Life Sciences Edition can create price lists that can be associated with orders. You can associate multiple products with a price list. Each product has a specific price for a particular price list.

To set up price lists for Oracle CRM On Demand Life Sciences Edition, you must have both the Manage Content privilege and the Enable Order Access privilege enabled for your role. To associate price lists with orders, users must have either the Enable Order Access privilege or the Enable Basic Samples Operations privilege enabled for their role.

To add products to the price list, you must be able to access the Price List Line Items related information section on the Price List Detail page. This section is not available on the page by default. Company administrators can create a customised page layout that includes the Price List Line Items related information section and then assign the customised layout to each role that sets up price lists. To assign page layouts for the Price List record type to a user role, the company administrator must have the Manage PRM Access privilege. If the Manage PRM Access privilege is not enabled for your company administrator's role, then contact Oracle CRM On Demand Customer Care.

NOTE: After the Manage PRM Access privilege is enabled for your company administrator's role, the record types that are used for Oracle CRM On Demand for Partner Relationship Management are available in Oracle

CRM On Demand. For more information about these record types, see the Partner Relationship Management and High Tech section of the online help. Price lists that have the Published value in the Status field can be associated with some of the record types that are used in Oracle CRM On Demand for Partner Relationship Management. Any price list can be associated with an order record, regardless of the value in the Status field of the price list.

To set up a price list

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click Content Management.
3. In the Product Catalogue section, click Price Lists.
4. On the Price List List page, do one of the following:
   - To add a price list, click New.
   - To update price list information, click the Edit link for the price list.
5. On the Price List Edit page, complete the information.

The following table describes the fields for price lists. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Price List Information	
Price List Name	The name of the price list.
Effective From	The date that begins the effective period during which the price list is valid.
Effective To	The date that ends the effective period during which the price list is valid. If this field is empty, then the price list is effective indefinitely.
Type	The type of price list. The following values are available by default: ■ **DIST COST.** The costs for the pharmaceutical company, which are the original stocking costs that the physician or pharmacy must pay to purchase products from the pharmaceutical company. ■ **MSRP.** The Manufacturer's Suggested Retail Prices, which are the prices that the pharmaceutical company recommends for products sold to customers. Your company can add values to the picklist for the Type field.
Status	The current status of the price list. The values available by default are In Progress and Published. The default value for all new price lists is In Progress. **NOTE:** The price list is available in the Lookup window for the Price List field on order records regardless of the value in the Status field of the price list.

Field	Description
Currency	The type of currency used by the price list. All prices in a price list are in the same currency, which is defined when the price list is created. When you save the new price list record, this field becomes read-only and cannot be updated.
Additional Information	
Created	The name of the person who created the price list, as well as the date and time when the price list was created.
Modified	The name of the person who last modified the price list, as well as the date and time when the price list was most recently modified.
Description	Additional information about the price list. This field has a limit of 2,000 characters.

Adding Price List Line Items

After creating a price list, you can add products as line items for the price list. A price list can contain multiple products, but each product can be listed only one time in any given price list.

To add a price list line item

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click Content Management.
3. In the Product Catalogue section, click Price Lists.
4. Click the name of the price list that you want to update.
5. On the Price List Detail page, in the Price List Line Items related information section, click Add.
6. On the Price List Line Item Edit page, complete the information.

The following table describes the fields for price list line items. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Price List Information	
Price List	The name of the price list.
Product	The product for the price list line item.
Effective From	The date that begins the effective period during which the indicated price list line item is valid. This date must be within the Effective From and Effective To dates for the price list.
Effective To	The date that ends the effective period during which the indicated price list line

Field	Description
	item is valid. If this field is empty, then the price list line item is effective indefinitely.
Product Part #	The product part number is defined as part of the product set-up. For products in Oracle CRM On Demand Life Sciences Edition, the part number is typically made up of the product name and the strength or dosage of the product.
Price Type	Denotes the type of the price. The current default value is Standard.
List Price	The price for the line item during the indicated effective period.
Additional Information	
Created	The name of the person who created the price list line item, as well as the date and time when the price list line item was created.
Modified	The name of the person who last modified the price list line item, as well as the date and time when the price list line item was most recently modified.
Description	Additional information about the price list line item. This field has a limit of 2,000 characters.

Managing Your Company's Attachments

From the Content Management section of the Admin Homepage, you can access the Manage Attachments page, where you can review attachments.

NOTE: The Manage Attachments page shows only the attachments that are linked to parent records through the preconfigured Attachments related item. The Manage Attachments page does not show attachments that are linked to parent records through custom attachment record types or attachments that are added to records through attachment fields. For a list of the record types that support the preconfigured Attachments related item, see About Attachment Configurations (on page 262).

Reviewing attachments helps you to determine:

- Which file attachments are taking up large amounts of storage space
- Which files have been attached more than once

  If a file has been attached more than once, consider placing the attachment on a common shared location and directing users to replace attachments with the path to those files.
- Which users need to be reminded of the storage issues for large attachments

Before you begin. To perform the procedures for managing attachments, your role must include the Manage Content - Manage Attachments and Detail Page Images privilege.

To review attachments

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click the Content Management link.
3. In the Manage Attachments and Images section, click the Manage Attachments link.
4. Do any of the following:

Task	Action
View an attachment	Choose View in the record-level menu for the attachment.
Delete an attachment	Choose Delete in the record-level menu for the attachment. The deleted file or URL is moved to the Deleted Items page and is permanently removed from the database after 30 days. If you need to delete multiple attachments, you can use the Batch Delete command. For information on Batch Delete, see Creating and Using Attachment Lists below.
Replace an attachment	To replace a file with a different one, choose Replace in the record-level menu for the attachment. On the Edit page, browse to the new file and save the record. To replace a URL with a different one, click Replace. On the Edit page, enter the required information and save the record. For complete instructions, see Attaching Files and URLs to Records.
Display the record count	To display the quantity of attachment records that meet the current list filter or other specifications, click the Menu button and select Record Count.

Creating and Using Attachment Lists

You can restrict the current display of records to show only records that meet specific criteria (such as file size greater than a specific value, attachments of a specific type, and so on). You can save these specifications as a named list that you can reuse whenever you display the Manage Attachments page.

With lists, you can perform the following tasks:

Task	Action
Create a new list	To create a new list, click the Menu button and select Create New List. For more information, see Working with Lists.
Show List Filter	To display the current list filter criteria, click the Menu button and select Show List Filter. The View List page shows the current criteria in the Filter Information tab, and the selected fields in the Selected Fields tab.

Task	Action
Refine List	To refine your current list criteria, click the Menu button and select Refine List. For more information, see Working with Lists.
Save List	When your list definition is complete, you can save it for future reuse. Click the Menu button and select Save List. In the Refine List page, enter a list name and click Save and Run.
Export List	You can export the currently displayed list of attachments to a file. Click the Menu button and select Export List. For more information, see Exporting Records in Lists.
Batch Delete	To delete all attachments shown in the list, click the Menu button and select Batch Delete. When prompted, click OK. For more information, see Batch Delete and Restore Queue Page (on page 797).

Managing Detail Page Images

From the Content Management section of the Admin Homepage, you can access the Manage Detail Page Images page, where you can review images that are associated with detail pages.

The Manage Detail Page Images page shows only images that are displayed on detail pages and provides a central location for managing all such images. Alternatively, you can visit detail pages and manage the images individually. Reviewing images helps you to determine which images are taking up large amounts of storage space.

Before you begin. To perform the procedures for managing detail page images, your role must include the following privileges in the Admin: Content Management category:

- Manage Content
- Manage Content - Manage Attachments and Detail Page Images

To manage detail page images

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click the Content Management link.
3. In the Manage Attachments and Images section, click the Manage Detail Page Images link.
4. The Manage Detail Page Images page opens. It has the following columns:
   - **Image.** A thumbnail of the image.
   - **Size (in Bytes)**. The size of the image stored in Oracle CRM On Demand.
   - **Created By.** The user name of the user that added the image.

- **Modified By**. The user name of the user that last modified the image.
- **Last Modified.** The date and time the image was last modified.
- **Object Type.** The record type to which the image is associated.
- **Object Id.** The row ID of the record to which the image is associated.

5 Do any of the following:

- To delete an image, select Delete in the record-level menu for the image. Then follow the prompts.
- To download an image, select Download in the record-level menu for the image. Then follow the prompts.
- To replace an image, select Replace in the record-level menu for the image. Then follow the prompts.
- To limit the images displayed in the list, click the drop-down menu and change the selection.

  The drop-down list contains standard lists distributed with the application.
- To export a list, click Menu and select Export List. For more information, see Exporting Records in Lists.
- To create a new list, click Create New List. For more information, see Working with Lists.

Setting Up Assessment Scripts

You can set up assessment scripts to help users to follow consistent processes when collecting data and making decisions. The assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction and so on. The assessment responses are scored, assigned a weight and compared with a specified threshold to determine the appropriate outcome or course of action.

With Oracle CRM On Demand, you can set up assessment scripts that allow your company to:

- Capture activity information for a sales call, task, or appointment.
- Conduct satisfaction surveys with customers.
- Gather responses to business plans.
- Automate the qualification of leads.
- Gather responses to objectives.
- Assess opportunities (by enforcing a sales methodology at your company).
- Conduct customer satisfaction surveys for contact and service request records.
- Use call scripts for service request records.

To find out more about assessment scripts, or to see step-by-step instructions for creating assessment scripts, see the following:

- About Assessment Scripts (on page 820)
- Creating Assessment Scripts (on page 823)

About Assessment Scripts

An *assessment script* is a series of questions that helps users to collect customer data. Assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, capture activity information, and so on.

You can score customer answers, assign different weights to questions and set thresholds for establishing decisions. In addition, you can map fields used during the assessment to the parent record and, later, run reports and analyses based on those fields.

Before you begin: To perform the procedures described in this topic, your role must include the Manage Content privilege.

How Are Assessment Scripts Used?

The process of using an assessment script is as follows:

1. The user launches an assessment script from a record detail page. The appropriate assessment scripts (determined by specified record field values) are listed on the record detail page. The user can also search for other assessment scripts, if necessary.

2. Working through the assessment questions, the user gathers critical customer information, such as details about the quality of a sales lead, and selects the correct response for each question from a drop-down list of choices.

3. Based on the responses, a score is automatically calculated, and the record is updated. For example, a lead is classified as qualified or rejected.

4. The answers to the questions are mapped as field values in the record, so that the answers are easily accessible, and available for reporting.

5. The completed assessments are stored and can be accessed in a related records section of the parent record.

Which Type of Assessment Script Should You Create?

You can set up a number of different types of assessment scripts. Each script type is suitable for a specific task. Use the script types as follows:

- **Account Survey:** Use this type to conduct surveys with individual customers.
- **Activity Assessment:** Use this type to capture valuable contact and account call information.
- **Business Plan Assessment:** Use this type to allow sales representatives to gather information that will help to determine the effectiveness of business plans.
- **Contact Script:** Use this type to conduct customer satisfaction surveys with individual contacts.
- **Lead Qualification:** Use this type to help sales representatives to identify the qualified leads. Using a script for this task reduces the need for training and enforces consistent lead qualification.

  NOTE: A lead qualification script might fail to set the Status field on the lead to Qualified if certain fields on the lead are not populated. For more information, see Required Fields for Lead Qualification.

- **Objective Assessment:** Use this type to allow sales representatives to gather information that will help to determine the effectiveness of objectives.
- **Opportunity Assessment:** Use this type to embed sales methodologies and help sales representatives to assess the opportunities so that they can adjust their sales strategies as they work on deals.
- **Service Request-Script:** Use this type to help service representatives to assess service requests; for example, to determine the priority or the escalation path for the request. Using a script for this task reduces the need for training and enforces consistent customer service.
- **Service Request-Survey:** Use this type to administer customer satisfaction surveys (that are linked to a specific service event).

Each type of assessment is linked to a corresponding record type: Appointment, Sales Call, or Task; Account; Business Plan; Contact; Lead; Objective; Opportunity; or Service Request. If necessary, you can create multiple assessments of each type and present the appropriate script to the user. The script is based on the specified record criteria.

Process of Creating Assessment Scripts

You must complete several tasks to set up an assessment script.

1 Customise the assessment script filters.

The filters allow you to define the criteria used to identify the appropriate assessment for a task, based on the specified record field values.

For example, a lead qualification assessment script might be set up with the following filters:

- Account Tier = Gold
- Segment = Large
- Region = West

Then, when a user launches an assessment script from a lead record with the corresponding values, the correct lead qualification script is listed.

All assessment script types use the same four filter fields, each with a defined picklist of values. To customise the filters, you must:

a Enter the filter field display names and picklist values for every record type for which you want to create an assessment script.

For more information, see Creating Assessment Scripts (on page 823).

b Add the filter fields to the page layouts for every record type for which you want to create an assessment script.

2 Create the assessment script:

a Enter the script details.

b Add criteria (questions) to the script.

c Add a list of potential answers for each question.

For more information on these steps, see Creating Assessment Scripts (on page 823).

3 Give users access to the script:

a For each user role that must use assessment scripts, configure the user role and the access profiles:

- **To create assessments.** For a user to be able to create assessment scripts, you must give the user's role access to the Assessment record type, which means that the access-level setting for the default and owner access profiles for the user's role must be set to at least Read/Edit for the Assessment record type. Also, the record type access-settings for the role must have the Has Access and Can Create check boxes selected for the Assessment record type.
- **To view assessments.** For a user to be able to view the details of an assessment, you must give the user's role read access to the Assessment record type, which means that the access-level setting for the default and owner access profiles for the user's role must be set to at least Read-Only for the Assessment record type. Also, the record type access-settings for the role must have the Has Access and Can Read All Records check boxes selected for the Assessment record type.

For more information about setting up user roles, see Adding Roles (on page 309). For more information about setting up access profiles, see Process of Setting Up Access Profiles (on page 332).

b For each record type for which you have created assessment scripts, add the appropriate assessment script section to the displayed information on the record detail page. For more information about customising page layouts, see Customising Static Page Layouts (on page 165).

Example of an Assessment Script

A typical script that a company administrator might want to set up is a Lead Qualification script, which is used to determine whether a lead is to be qualified or rejected.

The following table shows the sample values that might be used for such a script.

Script Field	Example Value
Type	Lead Qualification
Threshold Score	50
Outcome Value If Threshold Met	Qualified
Outcome Value If Threshold Not Met	Disqualified
Field to Map Outcome Value To	Description

Some examples of criteria for the Lead Qualification script are shown in the following table.

Criteria	Weight
What is the current status of your budget?	50
What is driving the timeline for this project?	25
When is it planned to make a decision?	25

Examples of answers and scores for the question "What is the current status of your budget?" are shown in the following table.

Answer	Score
Budget Approved	100
Budget Rejected	0

The score for each criterion is calculated by multiplying the weight of the criterion by the score for the answer, where the weight is a percentage. In this example, if a user chooses the answer Budget Approved, the score for the question is calculated as follows:

(0.5 * 100) = 50

The total score for the script is the sum of the scores for all the criteria. If the final outcome of the script meets or exceeds the threshold defined in the script, the value of the Description field on the Lead Detail page is set to Qualified. If the score falls below the threshold, the value of the field is set to Disqualified.

When assessment scores are calculated, the following rules apply:

- Scores for individual questions are rounded to the nearest single decimal place.
- The overall assessment score is rounded to the nearest whole number.
- Rounding rules are based on standard mathematical rules, so that a decimal value of less than 0.5 is rounded down, while a decimal value of 0.5 or greater is rounded up.

Creating Assessment Scripts

To customise assessment script filters and create an assessment script, follow the steps in this topic.

Before you begin:

- To perform this procedure, your user role must include the Manage Assessments Access privilege and the Manage Content privilege.
- If necessary, customise the picklist values and fields you want to use as part of the assessment criteria. For example, you can add custom fields to display information collected during the customer interview. When you set up the script, you can map the answers to those custom fields.
- Before you start to create your assessment scripts, see About Assessment Scripts (on page 820).

  Be sure to add any new fields to the page layout for that record. For instructions, see Customising Static Page Layouts (on page 165).

NOTE: You cannot translate the components of assessment scripts directly in Oracle CRM On Demand. If you want to use an assessment script in more than one language, you must create a version of the script in each language.

You can use assessment script filters to identify which script is the appropriate one to present to a user for a task, based on specified record criteria. The following procedure describes how to customise assessment script filters.

To customise assessment script filters (optional)

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

2 Click the Application Customisation link.

3 Under Record Type Set-up, click Assessment.

4 Click Assessment Field Set-up.

5 Click Edit and edit the Display Name column for each of Filter 1, 2, 3 and 4.

6 For each field, click Edit Picklist and set up the values for the picklist.

TIP: Keep the default <No Values> value at the top of the picklist options, unless you want to force your employees to select something from the picklist.

7 Save the record.

8 To relabel these fields in the record pages that your employees use, go to the Field Set-up section for each of the record types you are running assessment scripts with.

NOTE: The same picklist values you set up for Assessment Fields are displayed in these other records. However, you can customise the display name for these fields for each record type.

To create an assessment script

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

2 Click the Content Management link.

3 Click the Assessment Scripts link.

4 On the Assessment List page, click New Assessment.

5 On the Assessment Edit page, complete the required information.

The following table describes field information for assessments. An administrator can add, relabel or delete fields, so the fields that you see might differ from those in this table.

Field	Description
Name	Limit of 50 characters. Use a descriptive name that includes the purpose of the script. If your company employees use various languages, include the language in the script name.
Type	Determines the record type that the script is linked to. The available options are: Account Survey, Activity Assessment, Business Plan Assessment, Contact Script, Lead Qualification, Objective Assessment, Opportunity Assessment, Service Request - Script, and Service Request - Survey.
Active	Only scripts that are active are available to users.
Filter 1, 2, 3, 4	Displays the label that you set up for the assessment category.

Field	Description
Threshold Score (1-100)	Used to calculate the outcome of the scripts. If the score of the script is equal to or higher than the threshold, the outcome is met.
Field to Map Score To	Determines the field to display the score in the parent record.
Outcome Value If Threshold Met	(Optional) Determines the value to display if the outcome is met. For example, if the lead meets the criteria for qualification, this field can display *Qualified.*
Outcome Value If Threshold Not Met	(Optional) Determines the value to display if the threshold is not met. For example, if the lead does not meet the criteria for qualification, this field can display *Rejected*.
Field to Map Outcome Value To	(Optional) Determines the field to display the outcome in the parent record when the script is completed.
Remove Comment Box	Select this check box to remove the ability to add comments when completing an assessment. If this check box is deselected, then a comment box is visible, and you will be able to enter a comment when completing an assessment.
Response Control	Determines the control that will be used for adding responses to assessment criteria. The options are: Drop Down or Radio Button.

NOTE: An assessment script must be active and have at least one criterion defined before it is displayed on the Record Detail page.

6 Click Save.

7 On the Assessment Detail Page, in the Criteria section, click New or Edit.

8 On the Criteria page, complete the information.

The following table describes the fields you complete for the criteria.

Field	Description
Order	Determines the sequence of the questions presented to the user when the user is completing the assessment.
Criteria Name	A short, descriptive name that summarises the question. The field has a limit is 20 characters.
Question	A question that the user answers. The field has a limit of 50 characters.
Weight	A percentage between 0 and 100 to indicate the importance of the question. The sum of the weights for all questions must equal 100.
Answer Map to Field	Specify a field on the parent record for mapping the answer to the question in the Question field. Mapping answers to the parent record makes the values available in integration, reporting, and lists.

9 On the Assessment Detail Page, click each criterion name and then click the New or Edit button in the Answers section.

10 On each Answers page, complete the following information:

Field	Description
Order	Determines the sequence of the answers presented to the user when the user is completing the assessment.
Answer	Enter a valid answer for the user to select for the question. Limit is 30 characters.
Score	The number of points associated with the answer. The score for the selected answer is multiplied by the weight of the associated question to determine the total question/answer score.

11 Save your changes.

NOTE: For each user role that must use assessment scripts, you must configure the user role to provide access to assessment scripts. For information on the settings that are required for the user role, see About Assessment Scripts (on page 820).

TIP: Make sure that each role has a page layout that includes the new fields you added for assessment.

Application Plug-Ins

This topic provides information on administering application plug-ins. Your company administrator must enable any plug-ins available to you. If the Application Plug-In heading does not appear on the Administration page, then no plug-ins have been enabled.

- For information on configuring Oracle Social Engagement and Monitoring, see Configuring Oracle Social Engagement and Monitoring (on page 826).
- For information on configuring Oracle Social Network, see Configuring Oracle Social Network Integration Settings (on page 828).
- For information on configuring Oracle Eloqua Engage, see Configuring Email Delivery Using Oracle Eloqua Engage (on page 829).

Configuring Oracle Social Engagement and Monitoring

Before you can use Oracle Social Engagement and Monitoring you must first configure the feature to enable Oracle CRM On Demand to create contact or service request records that are based on social monitoring.

Note: To configure Oracle Social Engagement and Monitoring, your role must have the Manage Social Engagement and Monitoring Access privilege. To use Oracle Social Engagement and Monitoring, your role must have the Social Engagement and Monitoring Integration privilege.

To configure Oracle Social Engagement and Monitoring record access

1 Navigate to Admin, and then Oracle Social Engagement and Monitoring.

2 Select the boxes for Contact and Service Request, and click Save.

To enable the service request features, your company administrator must add the Oracle Social Engagement and Monitoring fields to the service request page layout for your role. For more information, read Customising Static Page Layouts (on page 165).

Process of Integrating Oracle Social Network with Oracle CRM On Demand

If your company uses Oracle Social Network, then you can integrate Oracle Social Network with Oracle CRM On Demand. After you integrate Oracle Social Network with Oracle CRM On Demand, users in your company can share information from records in Oracle CRM On Demand as social objects in Oracle Social Network.

NOTE: Users in Oracle Social Network who are not users in Oracle CRM On Demand can access the social object for a shared record from Oracle CRM On Demand if another user adds them to the social objects in Oracle Social Network. Similarly, users in Oracle CRM On Demand who do not have access to a specific record in Oracle CRM On Demand can access the social object for that record in Oracle Social Network if another user adds them to the social object in Oracle Social Network.

To integrate Oracle Social Network with Oracle CRM On Demand, perform the following tasks:

1 Contact Oracle CRM On Demand Customer Care and ask to have the Manage Oracle Social Network Integration privilege enabled for your company administrator's role.

After the Manage Oracle Social Network Integration privilege is enabled by Oracle CRM On Demand Customer Care, the Oracle Social Network link becomes available in the Application Plug-Ins section of the Admin Homepage in Oracle CRM On Demand.

2 In Oracle CRM On Demand, configure the Oracle Social Network integration settings, as described in Configuring Oracle Social Network Integration Settings (on page 828).

3 Configure the page layouts and user roles to allow users to use the Oracle Social Network integration, as follows:

- Add the Social related information section to the appropriate page layouts for the record types.
- Enable the Oracle Social Network Integration privilege and make the Social Web tab available for the user roles as necessary.

NOTE: Users who have personalised a page layout to which you add the Social related information section do not see the Social section on their page layout by default. For information about how personalised page layouts interact with page layouts for roles, see How Personalised Related Information Layouts Interact with Page Layouts for Roles (on page 217). For information about resetting page layouts to the default layout, see Resetting Personalised Page Layouts (on page 336).

For more information about integrating Oracle Social Network with Oracle CRM On Demand, see 1802518.1 (Article ID) on My Oracle Support.

Related Topics

See the following topics for related information:

- Customising Static Page Layouts (on page 165)
- Adding Roles (on page 309)

Configuring Oracle Social Network Integration Settings

This topic describes how to configure the settings for integrating Oracle Social Network with Oracle CRM On Demand. As part of the configuration, you specify the record types that are to be available for sharing in Oracle Social Network. The following record types in Oracle CRM On Demand can be shared as social objects in Oracle Social Network:

- Account
- Opportunity
- Service Request

You can make one or more of these record types available for sharing in Oracle Social Network.

You also specify which fields from each record type are passed to Oracle Social Network. For each record type, you can select up to a maximum of 10 fields for the record in Oracle Social Network, and you can specify the order in which the fields are displayed.

NOTE: When a record is shared in Oracle Social Network, a title is displayed in the heading of the social object for the record in Oracle Social Network. The title that appears in the social object in Oracle Social Network is the same as the title of the record in the record Detail page in Oracle CRM On Demand. The title is not counted as one of the 10 fields that you can select to be displayed in Oracle Social Network.

To configure the Oracle Social Network integration settings, complete the steps in the following procedure. This task is a step in Process of Integrating Oracle Social Network with Oracle CRM On Demand (on page 827).

Before you begin. To perform the following procedure, you must have the Manage Oracle Social Network Integration privilege in your user role. In addition, you must have the following information:

- The URL for your company's instance of Oracle Social Network
- An integration user ID and integration password for Oracle Social Network

To configure Oracle Social Network integration settings

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Plug-Ins section, click Oracle Social Network to open the Oracle Social Network Administration wizard.
3. In the Oracle Social Network Administration wizard, in Step 1, General Configuration, enter the following information:
   - The URL for your company's Oracle Social Network instance

- The integration user ID for Oracle Social Network
- The integration password for Oracle Social Network

4 In Step 2, Record Type Access, do the following for each record type that you want to allow users to share in Oracle Social Network:

   a Select the Enable in OSN? check box.

   b Click Field Set-up for the record type, and move the fields that you want to appear in the social object in Oracle Social Network from the Available Fields list to the Selected Fields list. You can select up to a total of 10 fields.

   c In the Selected Fields list, use the up and down arrows to arrange the order in which the fields are to appear in the social object in Oracle Social Network.

      The fields are shown in two columns in the social object in Oracle Social Network. The first field in the Selected Fields list appears at the top left of the social object, the second field appears at the top-right, the third field appears below the first field on the left of the record, and so on.

5 When you finish setting up the record type access and the fields for each record type, click Finish to save your changes.

NOTE: After you configure the Oracle Social Network integration settings, the Social related information section becomes available for each of the record types that you enabled for integration with Oracle Social Network. You can add the Social section to the page layouts for the record type as necessary. The Social section is not added to any page layout by default.

Configuring Email Delivery Using Oracle Eloqua Engage

You can configure Oracle CRM On Demand to send marketing emails to customer contacts and leads using Oracle Eloqua Marketing Cloud Service and its add-on product, Oracle Eloqua Engage. After you complete this configuration, Oracle CRM On Demand users can create these emails from an email template designed for their customer contacts. These users can then send the emails to individual contacts or leads from a Detail page, or to a list of contacts or leads from a List page if you have configured the Allow Sending Engage Emails from Lists setting. All sent emails are logged, activities such as opening and sending emails, and click-throughs are tracked in Oracle Eloqua Engage. For information on Oracle Eloqua Engage, see the Oracle Eloqua Marketing Cloud Service Web site http://www.oracle.com/us/corporate/features/marketing-automation/index.html. For information on sending emails, see Sending Marketing Emails Using Oracle Eloqua Engage.

NOTE: Your company must purchase the required licences to use Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage. Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage are both separately licensed products from Oracle CRM On Demand.

Before you begin. You must have an instance of Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage available that you can set up for your company. In addition, your user role must include the following privileges:

- Oracle Eloqua Marketing Cloud Service Integration

- Manage Oracle Eloqua Marketing Cloud Service Integration

If these privileges are not enabled for the administrator's role, then contact Oracle CRM On Demand Customer Care.

To configure email delivery using Oracle Eloqua Engage

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Plug-In section, click the Oracle Eloqua Marketing Cloud Service link.

   NOTE: If your role does not include the Manage Oracle Eloqua Marketing Cloud Service Integration privilege, then the Oracle Eloqua Marketing Cloud Service link is not available on the Admin Homepage.

3. On the Oracle Eloqua Marketing Cloud Service Integration Administration page, under Engage Options, configure the following boxes or fields as required.

Field	Description
Engage URL	The URL for your instance of Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage, for example: https://secure.eloqua.com You can get this URL during the Oracle Eloqua Marketing Cloud Service implementation process.
Allow Sending Engage Emails from Lists	Select this field if you want Oracle CRM On Demand to send emails to a list of customer contacts using Oracle Eloqua Engage.

4. Click Save.

Related Topics

See the following topics for related information about marketing emails:

- Sending Marketing Emails Using Oracle Eloqua Engage
- Oracle Eloqua Marketing Cloud Service Web site http://www.oracle.com/us/corporate/features/marketing-automation/index.html

Life Sciences Management

Using the Admin global link and the Life Sciences Management section of the Admin Homepage, you can perform the following tasks:

- Manage and delete smart call templates. For more information, see Managing Smart Calls (on page 831).

- Set up Oracle CRM On Demand Life Sciences Edition related preferences. For more information, see Setting Life Sciences Related Preferences (on page 834).
- Designate which contacts to sample. For more information, see Authorising Contacts to Receive Samples (on page 838).
- Set up the automatic submission of sample transactions using workflows. For more information, see Setting Up the Automatic Submission of Sample Transactions (on page 839).

Managing Smart Calls

You can manage smart calls if your user role has the appropriate access level for the Smart Call record type (either Default or Owner access). You can review, edit, and update the details and line items attached to a smart call from the Manage Smart Call Templates page. After editing, the revised smart call template can be applied as required, and saved as either a public or private template.

Restrictions That Apply to Smart Calls

If you are using smart calls, be aware of the following restrictions:

- Oracle CRM On Demand does not support product allocation filtering for smart calls. If you enable allocation filtering using the Select Enable Filtering of Product Selection by Sales Rep Allocation setting, then allocation filtering rules are not respected for any saved smart call templates. If sales representatives use these templates, then they are not limited to accessing only their allocated products when they use the call related information sections, such as Products Detailed, Promotional Items Dropped, or Samples Dropped.
- Smart calls do not support sample allocation filtering for the Samples Dropped related information section in a Call Detail page. For example, the product selector for Samples Dropped displays only the products that are allocated to the user that are of type Sample and the allocation type of Sample Allocation. However, when this call information is saved as a smart call template, the product selector for Samples Dropped displays all products of type Sample and Promotional Item, and the allocation type of Sample Allocation and Promotional Item Allocation.
- On a Smart Call Detail page, you cannot edit an existing Products Detailed record using the Product link in the Products Detailed Related Information section because clicking the Product link for inline editing results in an exception. To edit an existing Products Detailed record from a Smart Call Detail page, click the Edit button for the record instead of using the Product link for the record.
- The product-blocking rules do not apply to smart call templates. For more information, see About Product Blocking and Smart Call Templates.

NOTE: You cannot duplicate smart call templates. Each smart call template must be unique.

To manage smart calls

1. In the upper right corner of any page, click the Admin global link.
2. Click the Smart Call Management link.

3 On the Manage Smart Call Templates page:

- To review the smart call, click the link in the Subject column.
- To delete the smart call, click Delete in the appropriate row.
- To edit the details of a smart call, click Edit in the appropriate row.

  For information about the fields on the Call Edit page, see Tracking Visits (Sales Calls) to Customers.
- To edit a smart call line item, click the link in the Subject column, go to the appropriate section on the Smart Call Detail page, then click Edit next to the appropriate line item.
- To delete a smart call line item, click the link in the Subject column, go to the appropriate section on the Smart Call Detail page, then click Delete next to the appropriate line item.
- To add a new line item to the smart call, click the link in the Subject column.

  For more information about adding line items to a smart call, see the tasks that follow.
- Revised smart call templates can be applied in the normal way and saved as either public or private templates, as described in the following tasks in Tracking Visits (Sales Calls) to Customers:
  - To track a visit (sales call) to a customer
  - To save the call information as a template

4 On the Manage Smart Call Templates page, click the Menu button.

The following table describes the tasks that you can perform from the Menu button on the Manage Smart Calls Templates Page.

To do this	Follow these steps
Batch Assign Book	On the Manage Smart Call Templates title bar, click Menu, and select Batch Assign Book. Complete the steps described in Assigning Records to Books (on page 378).
Refine List	On the Manage Smart Call Templates title bar, click Menu, and select Refine List. Complete the steps described in Creating and Refining Lists.
Save List	On the Manage Smart Call Templates title bar, click Menu, and select Save List.
Show List Filter	On the Manage Smart Call Templates title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page.
Manage Lists	On the Manage Smart Call Templates title bar, click Menu, and select Manage Lists. Complete the steps for your required task as described in Manage Lists Page.
Create New Lists	On the Manage Smart Call Templates title bar, click Menu, and select Create New Lists. Complete the steps described in Creating and Refining Lists.

The following procedure describes how to link product detailed information to a smart call record.

To link product detailed information to a smart call record

1 On the Smart Call Detail page, scroll down to the Products Detailed section, and click New.

NOTE: If the Products Detailed section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Products Detailed section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Product Detailed Edit page, enter the required information.

For more information about the fields on the Product Detailed Edit page, see the following task in Tracking Visits (Sales Calls) to Customers: To link product detailed information to a call record.

3 Save the record.

Repeat these steps, as required, to add more Product Detailed line items to the smart call record.

The following procedure describes how to link samples dropped information to a smart call record.

To link samples dropped information to a smart call record

1 On the Smart Call Detail page, scroll down to the Samples Dropped section and click New.

NOTE: If the Samples Dropped section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Samples Dropped section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Samples Dropped Edit page, enter the required information.

For more information about the fields on the Samples Dropped Edit page, see the following task in Tracking Visits (Sales Calls) to Customers: To link samples dropped information to a call record.

3 Save the record.

Repeat these steps, as required, to add more Samples Dropped line items to the smart call record. For additional information on samples dropped, see Dropping Samples During a Sales Call.

The following procedure describes how to link promotional items, educational items, or other marketing items to a smart call record.

To link promotional items, educational items, or other marketing items to a smart call record

1 On the Smart Call Detail page, scroll down to the Promotional Items section, and click New.

NOTE: If the Promotional Items section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Promotional Items section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Promotional Item Dropped Edit page, enter the required information.

For more information about the fields on the Promotional Item Dropped Edit page, see the following task in Tracking Visits (Sales Calls) to Customers: To link promotional items, educational items, or other marketing items to a call record.

3 Save the record.

Repeat these steps, as required, to add more Promotional Items line items to the smart call record.

The following procedure describes how to link book information to a smart call record.

To link book information to a smart call record

1 On the Smart Call Detail page, scroll down to the Books section, and click New.

NOTE: If the Books section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Books section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Books page, enter the required information.

For more information about the fields on the Books Edit page, see Book Fields (on page 381).

3 Save the record.

Repeat these steps, as required, to add more Book line items to the smart call record.

Setting Life Sciences Related Preferences

As an administrator, you can set up the following preferences for Oracle CRM On Demand Life Sciences Edition on the Life Sciences Related Preferences page:

- Life Sciences preferences:
  - Generate Call Activity History
  - Allow Submission of Future Calls & Sample Transactions
- Define Sample Related Preferences:
  - Number of Times a Contact Can Be Sampled
  - Enable Filtering of Product Selection by Sales Rep Allocation
  - Enable Contact State Licence Validation
  - Enable Signature Validation

You can update the Life Sciences related preferences by clicking Edit on the Life Sciences Related Preferences page and saving the updates, or by using inline editing to update individual preferences.

Before you begin: Your role must include the Manage Pharmaceutical Access privilege to set Oracle CRM On Demand Life Sciences Edition preferences.

To set Oracle CRM On Demand Life Sciences Edition related preferences

1 Navigate to the Life Sciences Related Preferences administration page by clicking Admin, Other Life Science Related (in the Life Sciences Management section), and then Life Science Related Preferences.

2 Set the following preferences as required:

In the Life Sciences Preferences section:

- Generate Call Activity History

  Select this setting to generate the interaction-history data of the call activity for using and displaying in the Oracle CRM On Demand Disconnected Mobile Sales application.

  NOTE: Choose this setting only if you are a licensed user of the Oracle CRM On Demand Disconnected Mobile Sales application.

- Allow Submission of Future Calls & Sample Transactions

  Select this setting to allow users to submit calls and sample transactions that are dated in the future.

  NOTE: Choose this setting only if you are a licensed user of the Oracle CRM On Demand Disconnected Mobile Sales application.

In the Define Sample Related Preferences section:

- Number of Times a Contact Can Be Sampled

  For information on setting this preference, see Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State Licence (on page 836).

- Enable Filtering of Product Selection by Sales Rep Allocation

  For information on setting this preference, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 837).

- Enable Contact State Licence Validation

  Select this setting to have Oracle CRM On Demand check the validity of the contact state licence for all calls that contain a U.S. address, when a pharmaceutical sales representative submits product samples to drop to a physician or other health care provider. If this setting is selected, then Oracle CRM On Demand validates the following:

  - The state specified in the address of the call is the same as the state specified in the contact's state licence.
  - The date of the call takes place within the active period of the state licence, that is, the expiration of the state licence cannot occur prior to the date of the call. If a date is not specified on the contact state licence, then Oracle CRM On Demand assumes that the state licence is active and valid.

  These validation checks apply only to product sample drops and not to other related activities such as detailing products or dropping promotional items, and it applies to all call types: account calls, attendee calls and contact calls. If Oracle CRM On Demand determines that the state licence is invalid, then Oracle CRM On Demand issues an error message and prevents the sample drop. To proceed with the sample drop, the representative must add a valid state medical licence to the call.

- Enable Signature Validation

  Select this setting to have Oracle CRM On Demand check whether a signature record exists when a sales representative attempts to drop any product samples during a customer call using the Submit button on the Call Detail page. If no signature record is associated with the call and the Quantity value is a positive value in the Available Samples for Drop or Samples

Dropped related information sections on a Call Detail page, then Oracle CRM On Demand displays an error message and does not proceed with call processing when the sales representative submits the call. To proceed with call processing and allow the representative to drop the product samples, the representative must add the signature record for the contact to the call record before resubmitting the call.

Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State Licence

Administrators can set the maximum number of times a contact who does not have a valid state licence can be sampled. This setting is set at the global level and applies throughout the organisation. Configuring this setting ensures the following:

- That sales representatives in the field will not be able to exceed the specified maximum number of times contacts who do not have a valid state licence can be sampled.
- That when a contact moves to a different state, the contact can be sampled while waiting for a valid state licence. Typically, contacts must wait a few days to receive a valid licence when they move to a different state.

Before you begin. To set the maximum number of times contacts can be sampled without a valid state licence, your user role must include the Enable Basic Samples Operations privilege.

To set the maximum number of times contacts can be sampled without a valid state licence

1. In the upper-right corner of any page, click the Admin global link.
2. In the Life Sciences Management section, click the Other Life Sciences Related link.
3. On the Life Sciences Related Preferences page, click the Life Sciences Related Preferences link.
4. Enter a value in the Number of Times a Contact Can Be Sampled field.

   The default value in this field is -1, which indicates that the maximum number of times contacts can be sampled without a valid state licence has not been set and that there will be no impact on current behaviour. Setting the value in this field to any negative number will have the same effect.

   Setting the value in this field to a number greater than zero indicates that you are setting the maximum number of times contacts can be sampled without a valid state licence and the impact on behaviour is as follows:

   - Sales representatives will be able to sample contacts who are waiting for a valid state licence x number of times, where *x* is the value in this field, provided that the status of the licence is inactive or not null and that the licence has not expired.

     NOTE: To distribute samples to a contact, that contact type (for example, physician, pharmacist, nurse practitioner, doctor) must be authorised to receive and sign for samples. For more information, see Authorising Contacts to Receive Samples (on page 838).

   - If a contact moves to a different state, then the contact can be sampled x number of times while waiting for a valid state licence, where *x* is the value in this field. For more information, see Contact State Licence Fields.

Related Topics

See the following topics for related information about samples management:

- Authorising Contacts to Receive Samples (on page 838)
- Sample Transactions
- Managing Sample Transactions
- Sample Transaction Fields

Setting Up Picklist Filtering Based on the Allocation Records for a Sales Representative

Administrators can enable the filtering of picklists for Oracle CRM On Demand Life Sciences Edition items, such as products detailed, promotional items, samples dropped, message plans, and sample requests. When this filtering is set up, Oracle CRM On Demand filters the following picklist items displayed during a customer call (contact call, account call, or attendee call) by a pharmaceutical sales representative. Depending on the sales representative's allocation records, Oracle CRM On Demand applies the filtering to picklist items as follows:

- The products that the sales representative can detail
- The samples that the sales representative can drop
- The promotional items that the sales representative can drop
- The samples that the sales representative can request for a customer

If the filtering is not set up, then Oracle CRM On Demand does not filter these picklists by using the sales representative's allocation records.

Before you begin. To enable the filtering of picklists, your user role must include the Manage Pharmaceutical Access and Manage Company privileges.

To enable picklist filtering based on the allocation records for a sales representative

1. In the upper-right corner of any page, click the Admin global link.
2. In the Life Sciences Management section, click the Other Life Sciences Related link.
3. On the Life Sciences Related Preferences page, click the Life Sciences Related Preferences link.
4. Select Enable Filtering of Product Selection by Sales Rep Allocation.

   By default, this setting is not selected.

Related Topics

See the following topics for related information:

- Dropping Samples During a Sales Call

- Allocations
- Linking Product Detailed Information to Calls
- Linking Samples Dropped Information to Calls
- Linking Promotional Item Information to Calls
- Linking Sample Request Information to Calls

Authorising Contacts to Receive Samples

Sales representatives cannot distribute samples to any contact. They can distribute samples only to contacts who are authorised to receive and sign for samples. Administrators control this ability by designating which contact types can be sampled. If a sales representative tries to distribute samples to a contact who is not authorised to receive and sign for samples, then an error message similar to the following is displayed: Contact cannot be sampled.

Before you begin. To authorise contacts to receive samples, you must first create a custom field named Can Be Sampled of type picklist and with the values Yes and No.

To authorise contacts to receive samples

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customisation section, click Application Customisation.
3. In the Record Type Set-up section, click the Contact link.
4. In the Cascading Picklists section, click the Contact Cascading Picklist link.
5. On the Contacts Cascading Picklists page, click Edit next to the following cascading picklist definition.

Parent Picklist	Related Picklist
Contact Type	Can Be Sampled

6. Go to Step 2 of the Cascading Picklists Wizard, and set the Related Picklist Displayed Value to No for each contact (or Parent Picklist Available Value) that you do not want authorised to receive and sign for samples.

   NOTE: The Related Picklist Displayed Value for each contact (Parent Picklist Available Value) is set to Yes by default, which means that all contacts can be sampled by default.

   For example, in the following table, the following contacts are authorised to receive and sign for samples: Hospital Executive, Lab Technician, Nurse Practitioner, Pharmacist, and Physician.

Parent Picklist Available Value	Related Picklist Displayed Value
Prospect	No

Parent Picklist Available Value	Related Picklist Displayed Value
Customer	No
Partner	No
Hospital Executive	Yes
Lab Technician	Yes
Nurse Practitioner	Yes
Pharmacist	Yes
Physician	Yes
Physician Investigator	No
Research Nurse	No
Research Pharmacist	No
Research Lab Technician	No

For more information about cascading picklists, see Defining Cascading Picklists (on page 193).

Related Topics

See the following topics for related information about samples management:

- Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State Licence (on page 836)
- Sample Transactions
- Managing Sample Transactions
- Sample Transaction Fields

Setting Up the Automatic Submission of Sample Transactions

This topic describes how to use the workflow functionality in Oracle CRM On Demand to automatically submit sample transactions for processing.

Before you begin. Review the information in About the Automatic Submission of Sample Transactions (on page 841).

To set up the automatic submission of sample transactions

1. Determine which fields on the sample transactions that you will use in the condition on the workflow rules.

For example, you might decide to use the setting in a check box field on the sample transaction record type as the criterion for determining whether a record must be submitted. In the workflow rule, you can specify that if the check box is selected on a record, then the workflow submits the record. You can use an existing check box field, or you might want to set up a custom check box field and give it a name, such as Mark for Submit. For more information on setting up custom fields, see the sections on Field Management and Page Layout Management in the table in Record Type Application Customisation Page (on page 104).

2 Set up the necessary workflow rules for the Sample Transaction record type.

You can set up as many workflow rules as you want. It is likely that you will want to set up a workflow rule with the When Modified Record Saved trigger event to automatically submit the sample transaction records that are modified.

NOTE: While configuring the workflow rule, you must also include a condition to check whether the Status field is set to a value of *In Progress*. This condition is required so that when the Submit action runs successfully, the action changes the Status field of the Sample Transaction record, which is a modification action that calls this workflow again.

The following is an example of a minimal rule condition:

```
[<bMark_for_Submit_ITAG>]="Y" AND [<TransactionStatus>]="In Progress" AND
ExcludeChannel("Online")
```

In this example, Mark for Submit is a custom field, and ExcludeChannel is an optional condition that allows you to restrict the trigger so that the workflow becomes active only for an import, and not when the Submit Call button is used in the UI. If you receive any errors when this workflow action is triggered, see Viewing Error Instances in the Workflow Error Monitor (on page 494).

For information about setting up workflow rules, see Creating Workflow Rules (on page 446).

3 In each of the workflow rules, specify the condition that must be met for the actions on the workflow to be performed.

For example, you can specify that if a certain check box field on the record is selected, then the actions on the workflow rule must be performed.

NOTE: If you want to prevent the workflow rules from submitting records that are created or updated through the user interface, then set up the necessary restriction in the conditions on your workflow rules. For more information, see Restricting Workflow Rules to Specific Channels or Roles (on page 458).

4 Create the necessary Submit workflow action on each of your workflow rules.

For more information on the Submit workflow action, see the information on workflow actions for Oracle CRM On Demand Life Sciences Edition in About Workflow Actions (on page 434).

NOTE: The Submit action must be preceded by a Wait action with a non-zero wait value. Using a non-zero wait renders the workflow action as an asynchronous action. An asynchronous action is recommended for overall application performance, especially if you are importing and submitting a large set of sample transaction records.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or

later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

About the Automatic Submission of Sample Transactions

You can set up workflow rules to automatically submit sample transactions so that you do not have to open each record individually to submit sample transactions. Using workflow rules to submit a set of sample transaction records is helpful if you want to simultaneously submit a set of records that you create or update through Web services or through the Import Assistant. For example, when you send new inventory from the warehouse to your sales representatives, you might want to create a large number of sample transactions of type Transfer Out through the Import Assistant, and then submit them.

You can set up a workflow rule that is triggered every time a sample transaction record is updated, and a workflow action on that rule that submits the record automatically if a field on the record is set to a value that you specify in the condition on the workflow rule. For example, you can do the following:

1. Import a set of sample transaction records.
2. Import the transaction item records for the sample transactions imported in step 1.
3. Reimport the set of sample transaction records from step 1 with the trigger field set to the submit trigger value, for example, Mark for Submit set to Y.

NOTE: You must import all corresponding sample transaction items before you submit the sample transactions using the workflow rule.

If you want to prevent the workflow rules from submitting records that are created or updated through the user interface, then set up the necessary restriction in the conditions on your workflow rules. For more information, see Restricting Workflow Rules to Specific Channels or Roles (on page 458).

When you use a workflow to submit imported records, the following happens:

- Any errors for the workflow submit action do not prevent the sample transaction records from being imported, created, or updated.
- Changes made to the inventory counts are reflected in the Oracle CRM On Demand Disconnected Mobile Sales application.

Oracle CRM On Demand Desktop

Oracle CRM On Demand Desktop allows users to synchronise their Oracle CRM On Demand records with Microsoft Outlook. In the Desktop Integration Administration section of the Admin Homepage, you can click the Oracle CRM On Demand Desktop link to go to a page that enables you to set up this software for distribution to your users. You can do the following:

- Verify that your system meets the system requirements for Oracle CRM On Demand before you install Oracle CRM On Demand Desktop.

- Manage the customisation packages available to Oracle CRM On Demand Desktop users, see Administering Customisation Packages (on page 842).
- Download files from Oracle Software Delivery Cloud, which enable you to customise and deploy the Oracle CRM On Demand Desktop application.
- Set the download location for the Oracle CRM On Demand Desktop installer, see Setting Oracle CRM On Demand Desktop Installer Version Locations (on page 844).

For more information about installing, configuring, and deploying Oracle CRM On Demand Desktop, see *Oracle CRM On Demand Desktop Administration Guide*. For more information about customising Oracle CRM On Demand Desktop, see *Oracle CRM On Demand Desktop Customisation Guide*.

NOTE: An Oracle CRM On Demand Desktop Lite product is available in addition to the full Oracle CRM On Demand Desktop product. For more information about Oracle CRM On Demand Desktop Lite, see *Oracle CRM On Demand Desktop Administration Guide.*

Administering Customisation Packages

A *customisation package* is a collection of XML metadata files and JavaScript files that Oracle CRM On Demand Desktop associates with a particular role. The metadata files customise an Oracle CRM On Demand Desktop deployment. For example, you can perform the following kinds of customisation: you can add or remove the fields that Oracle CRM On Demand Desktop synchronises or change the layout of custom forms. For more information about customisation packages, see *Oracle CRM On Demand Desktop Administration Guide*.

NOTE: Oracle CRM On Demand Desktop Lite does not support customisation packages.

In the Package List page you can add new customisation packages, and copy, edit, and delete existing packages.

Publishing Customisation Packages

To make a customisation package active and available to Oracle CRM On Demand Desktop users, you must publish the package.

Package records become read-only when they are published, and the value in the Status field changes from Unpublished to Published. Only one customisation package can be active for a client version at any time. Therefore, if you try to publish a package for a role with a start date that overlaps with an existing customisation package for the same role, then an error message is displayed. However, a user with a specific role can have separate packages published for different client versions.

If it is necessary to change a metadata file in a package, then you must unpublish the package, attach the updated package file, and publish the updated package.

TIP: Because users with a specified role will not be able to download their package file while the record has the Unpublished status, it is recommended that you specify an end date for the currently active package and create a new package record when changes must be made. This action ensures that a package is always available to new users and also allows for more accurate version control and tracking.

Before you begin. To administer customisation packages, your role must include the Manage CRM Desktop Access privilege.

To add a customisation package

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

2 In the Oracle CRM On Demand Desktop section, click Oracle CRM On Demand Desktop.

3 Click Administer Customisation Packages.

4 On the Package List page, click the New Package button.

5 On the Package Edit page, complete the following fields.

Field	Comments
Package Name	Enter a name. It is recommended that you name packages according to the user role.
User Role	Select the role associated with the package.
Comments	Enter comments for the package.
Attachment	Click the attachment icon, and select the package file.
Start Date	Select a start date for the package if you require a date other than today's date.
End Date	If required, select an end date for the package. Published packages without a defined end date are considered to be active indefinitely. Therefore, you must define an end date to deactivate a package record and allow a new package to be published for a role.
Client Version	Version of the Oracle CRM On Demand Desktop client supported for this package.

6 Click Save.

Alternatively you can copy an existing package and change the details to your requirements.

To publish or unpublish a package

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

2 In the Oracle CRM On Demand Desktop section, click Oracle CRM On Demand Desktop.

3 Click Administer Customisation Packages.

4 On the Package List page, click the name of the package.

5 Click the Publish button or the Unpublish button as required.

When you publish a package, a value is generated in the Hash Value field. When you unpublish a package, the Hash Value field is cleared.

Setting Oracle CRM On Demand Desktop Installer Version Locations

In the Installer Locations screen, you can specify the Oracle CRM On Demand Desktop 32-bit or 64-bit installer download location for one or more versions by entering the URL for the installer EXE files. The specified URL can be any location on your network. For more information, see O*racle CRM On Demand Desktop Administration Guide.*

Before you begin. To set the Oracle CRM On Demand Desktop installer version location, your role must include the Manage CRM Desktop Access privilege.

Administrators must obtain these installers from Oracle Software Delivery Cloud first.

To set the Oracle CRM On Demand Desktop installer version location

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

2 In the Oracle CRM On Demand Desktop section, click Oracle CRM On Demand Desktop.

3 Click the Download Location link.

4 In the Installer Locations screen, do the following:

a For each version for which you want to configure a download location, enter the URL for the EXE files in the URL field next to the version.

b Click Save.

After setting the Oracle CRM On Demand Desktop installer version location, end users can install Oracle CRM On Demand Desktop by navigating to My Setup, Data & Integration Tools, then the Oracle CRM On Demand Desktop page where they can download the EXE file. For more information, see Installing Oracle CRM On Demand Desktop (on page 844).

Installing Oracle CRM On Demand Desktop

On the Oracle CRM On Demand Desktop page, you can click the Download Oracle CRM On Demand Desktop link to install Oracle CRM On Demand Desktop.

Before you begin. Check that you have the required software and hardware and software to run Oracle CRM On Demand Desktop, see Oracle CRM On Demand Web site http://crmondemand.oracle.com/en/products/system-requirements/index.html. For information about installing, configuring, and deploying Oracle CRM On Demand Desktop, see O*racle CRM On Demand Desktop Administration Guide*.

To install Oracle CRM On Demand Desktop, your role must include the Enable CRM Desktop Access privilege.

NOTE: The steps in this topic require that your system administrator has configured the installer locations. For more information, see Setting Oracle CRM On Demand Desktop Installer Version Locations (on page 844).

To install Oracle CRM On Demand Desktop

1. In the upper right corner of any page, click the My Set-up global link.
2. On the Personal Homepage, click the Data & Integration Tools link.
3. On the Data &Integration Tools page, click the Oracle CRM On Demand Desktop link.
4. On the Oracle CRM On Demand Desktop page, select the installer, and then click the Download Oracle CRM On Demand Desktop link.
5. On the second Oracle CRM On Demand Desktop page, read the additional information, and then click the Download Oracle CRM On Demand Desktop link.
6. In the window, do one of the following:
   - Click Save to copy the Oracle CRM On Demand Desktop EXE file to your hard drive to install Oracle CRM On Demand Desktop while you are offline. (Recommended)
   - Click Run to begin the installation. You must stay connected to the Internet to complete the installation.
7. Follow the instructions to complete the installation.

Expression Builder

Click a topic to see information about Oracle On Demand Expression Builder (Expression Builder) and how to use it:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- About Expressions (on page 849)
- Data Types in Expression Builder (on page 853)
- Expression Builder Operators (on page 856)

- Expression Builder Functions (on page 861)
- Expression Builder Examples (on page 904)

About Expression Builder

Oracle On Demand Expression Builder (Expression Builder) is a tool for implementing business rules using expressions. An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Oracle CRM On Demand.

Expression Builder is used in the following areas in Oracle CRM On Demand:

- Advanced field management, in the following contexts:
  - Configuring field validation properties on a field
  - Specifying default field values

  When defining field level validations and default field values, a company administrator can create flexible expressions to cover a variety of business rules. For more information on field validation and default values, see About Field Management (on page 106).
- Workflow rules and workflow actions.

  From the Workflow pages, a company administrator can set up workflow rules that are evaluated when a record is updated, created or deleted. Expressions are used to define both the conditions on the rules, and the actions that are executed by the rules. For more information about workflow rules, see About Workflow Rules (on page 423).

NOTE: Expression Builder can verify the syntax of an expression in most cases. However, it cannot evaluate or verify an expression for mathematical, logical, or semantic accuracy.

Related Topics

See the following topics for related Expression Builder information:

- Using Expression Builder (on page 846)
- About Expressions (on page 849)
- Data Types in Expression Builder (on page 853)
- Expression Builder Operators (on page 856)
- Expression Builder Functions (on page 861)
- Expression Builder Examples (on page 904)

Using Expression Builder

In Oracle CRM On Demand, you can use Expression Builder wherever you see the *fx* icon beside a text box. Clicking the icon opens Expression Builder in a separate window.

NOTE: For information about field names and the field-name syntax in expressions, see About Expressions (on page 849).

To build an expression

1 Click the *fx* icon to open Expression Builder.

2 In Expression Builder, select the fields and functions from the lists, or type in the expression editor.

When you select a field from the list, the language-independent name of the field is pasted in to the expression editor. For example, when you select the Close Date field from the list of Opportunity fields, [{Primary Revenue Close Date}] is pasted into the expression editor.

NOTE: The field names that are shown in the Fields list in Expression Builder are the display names for the fields. If your administrator changes the display name for a field, then the Fields list shows the new display name for the field. However, when you select the field from the list, the language-independent name of the field is pasted into the expression editor.

The brackets around the field name indicate that the value of the particular field will be evaluated and returned in its specific data type. See the following table for more information about selecting fields and field values.

3 Edit the expression by adding operators and literals as needed.

NOTE: If you want your expression to determine whether a picklist field has a certain value, do not type the value in the expression. For example, do not type [{Type}] = "Customer". Instead, select the picklist field from the list, and then click the Show Acceptable Values link in Expression Builder. Select the value that you want to use in the expression from the values shown. The expression looks something like the following:

[{Type}]=LookupValue("ACCOUNT_TYPE", "Customer")

4 (Optional) Click Check Syntax and then make any corrections.

5 Save your expression.

The following table describes Expression Builder.

Interface Element	Description

Interface Element	Description
record type Fields	Provides a context-specific picklist of the fields (from the context record type) that are allowed in an expression. If your company administrator has renamed some fields, the Fields picklist shows the new field names. Note the following points: ■ If you are creating a workflow rule or actions related to a workflow rule, the context record type is the record type specified in the definition of the workflow rule. For example, if you are creating the body of an email that is to be sent as an action on a workflow rule for a service request record, the context record type for Expression Builder is Service Request. ■ In advanced field management, the context record type is the record type that is the parent of the field where the expression is being created. For example, when defining field validation on an opportunity field, the context record type for Expression Builder is Opportunity.
Show Acceptable Values	When you have selected a field from the Fields picklist, click Show Acceptable Values to display the acceptable values for that field. ■ If the selected field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. You can select only one option at a time. Selecting an option results in the definition of a Lookup function that can be used in an expression. ■ If the selected field is not a picklist field, Show Acceptable Values displays a window that describes the acceptable values for a variety of data that the field can hold.
Functions	Provides a drop-down list of the special functions that are available to modify, extract or process data within an expression. For a list of the available functions, see Expression Builder Functions (on page 861).
Expression	A multi-line editable text box that displays the expression. For information about the maximum supported length of an expression, see About Expressions (on page 849). Fields and functions that you select from the picklists appear in the expression editor. You can also type expressions directly in the expression editor. The expression syntax always displays the language-independent field names. (A language-independent name is a name that does not change when the user language changes.)
Syntax Guide	Displays the Expression Builder topic in Oracle CRM On Demand online help.

Interface Element	Description
Sample Expressions	Displays the following topic, Expression Builder Examples, in Oracle CRM On Demand online help.
Check Syntax	Validates the syntax of the expression that you created.
Save	Saves the expression.
Cancel	Closes the Expression Builder window without saving any changes.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- About Expressions (on page 849)
- Data Types in Expression Builder (on page 853)
- Expression Builder Operators (on page 856)
- Expression Builder Functions (on page 861)
- Expression Builder Examples (on page 904)

About Expressions

An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Oracle CRM On Demand. This topic provides information about the following features of expressions:

- Fields and field-name formats in expressions
- Expression length
- Literal length
- Conditional expressions
- Validation expressions
- Using dependent fields in expressions

Fields and Field-Name Syntax in Expressions

Most of the fields that are available in the field setup page for a record type are also available in the field list for that record type in Expression Builder and can be used in expressions.

NOTE: Custom fields of the Text (Short - Maskable) field type are an exception. You cannot use these fields in an expression in Expression Builder.

When you add a field to an expression by selecting the field name from the field list in Expression Builder, the field is entered in the expression editor with the following syntax:

[{FieldName}]

The field names that appear in the expression editor are language-independent field names that are used to identify the fields internally in Oracle CRM On Demand. Although you can also type field names directly into the expression editor using the [{FieldName}] syntax, it is recommended that you always select the fields from the list of fields, so that the field names in the expression are correct.

About Field Names and Field-Name Syntax in Expressions in Earlier Releases

In releases earlier than Release 29 Service Pack 1 of Oracle CRM On Demand, when you selected a field from the field list in Expression Builder, the field was entered in the expression editor with the following syntax:

[<FieldName>]

In addition, in releases earlier than Release 29 Service Pack 1, Expression Builder used language-independent field names that are different from the language-independent field names used in Expression Builder in Release 29 Service Pack 1 and later releases. However, any expressions that use the [<FieldName>] syntax and the corresponding field names, and that were valid in earlier releases, continue to be valid in Release 29 Service Pack 1 and later releases. You can also continue to type the old language-independent field names with the [<FieldName>] syntax directly in the expression editor, if you wish. However, it is recommended that you always select the fields from the list of fields in Expression Builder, so that the field names and the field syntax are always correct.

An expression can contain a mixture of the new field names and the old field names, provided that the [{FieldName}] syntax is used for the new field names, and the [<FieldName>] syntax is used for the old field names.

About the Examples in Oracle CRM On Demand Online Help

Some of the examples of expressions that appear in the online help use the language-independent field names and the field-name syntax that were used in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields from the field list in Expression Builder when you create or update an expression in Release 29 Service Pack 1 or a later release, then the field names in the expression will be different from the field names shown in the examples in the online help, and the fields will appear in the expression editor with the new field syntax.

Expression Length

For the message body of an email configured through the Send Email action on a workflow rule, the maximum supported length of an expression is 2000 characters, including spaces. You can insert a line break in the email message by pressing Enter. A line break is counted as two characters in the text box.

In all other cases where Expression Builder is used, the maximum supported length of an expression is 1024 characters, including spaces.

You must also ensure that the total number of characters in the field where you are saving the expression does not exceed the limit for that field. In the following workflow fields, three percent signs (%%%) are placed before and after functions and field names:

- The Subject and Message Body fields in an email configured through the Send Email action

- The Subject and Description fields in a task configured through the Create Task action

The percent signs indicate that the function or field name is to be converted to a text value. Each percent sign is counted as one character in the field where the expression is saved.

If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added.

For example, if you use Expression Builder to insert the following field name into the message body of an email on a workflow action:

```
[{Name}]
```

Expression Builder inserts the following (a total of 14 characters) into the message body of the email on the workflow action:

```
%%%[{Name}]%%%
```

Literal Length

When you pass a string or numeric literal to a function in Expression Builder, the literal must not contain more than 75 characters, including spaces. If a literal exceeds 75 characters, then Expression Builder considers the literal to be a syntax error. When you pass a string to a function by referencing a field name, the limit of 75 characters does not apply to the length of the value in the field passed to the literal.

When you create an expression to set a default value for a field, the limit of 75 characters applies to any string or numeric literals passed to any function in the expression. In addition, the number of characters in the result of the expression must not exceed the maximum number of characters allowed in the field.

Conditional Expressions

A conditional expression is an expression that, when evaluated by the application, always returns a Boolean value such as True or False.

NOTE: Yes, No, Y, and N are not Boolean values. If you specify True or False as return values for functions such as the IIf (on page 870) function, then True and False are returned as strings and not as Boolean values. Using incorrect Boolean values in conditional expressions can result in unpredictable behaviour.

An expression used in any of the following contexts must be a conditional expression:

- To specify a field validation rule
- To specify a condition in a workflow rule
- As the first parameter in an IIf (on page 870) function

Validation Expressions

Validation expressions are used to ensure that the data entered in fields is valid. A validation expression must be a conditional expression.

A validation expression for a field is evaluated each time the field is updated on a new or existing record. However, a validation expression is not evaluated in the following circumstances:

- The field is left blank when the record is created or modified. Field validation does not force a value to be required.
- The field has a pre-existing value, either valid or invalid, and the value is not changed when the record is updated.

If a validation expression is not evaluated, or if a validation expression evaluates to NULL, no error message is generated. An error message is generated only when the validation expression fails (that is, the expression evaluates to FALSE).

A validation expression is different from other types of expressions in that it can start with a conditional operator. For example, if Account Name is the field being validated by the expression, the expression can start with:

```
= 'Acme Hospital'
```

This expression, though not well formed, will pass a syntax check, because Oracle CRM On Demand inserts the name of the field being validated before the expression if it does not find a field name at the start of the expression. You can also enter the validation expression as follows:

```
[<AccountName>]= 'Acme Hospital'
```

where [<AccountName>] is the field being validated.

If the expression requires other fields to be evaluated in addition to the field being validated, it is standard practice for the first comparison in the expression to be performed on the field being validated.

Validation expressions are used only in the Field Validation text box in advanced field management in Oracle CRM On Demand.

Validation Expression Examples

Example 1: A business process requires that the close date of an opportunity must be later than the created date of the opportunity.

To implement this process, create a validation expression for the Close Date field (in the Field Set-up page for opportunities) as follows:

```
> [<CreatedDate>]
```

Alternatively, you can use the following example, but note that the field that is being evaluated (Close Date) must be the first field in the expression:

```
[<CloseDate>] > [<CreatedDate>]
```

For information on creating and editing fields, see Creating and Editing Fields (on page 125).

Example 2: A business process requires that the revenue of an opportunity must be a non-zero value when the probability of the opportunity is 40% or greater.

The business rule indicates that the dependency is on both fields and can be restated as follows:

For an opportunity, revenue cannot be zero when the probability is greater than or equal to 40. Conversely, the probability cannot be greater than or equal to 40 if the revenue is zero.

A validation expression for a field is evaluated when the record is created and each time the field is updated by a user. Because an update to either the Probability field or the Revenue field can affect both fields, you

must have validation rules on both the Probability field and the Revenue field to implement the business rule correctly. (For information about creating and editing fields, see Creating and Editing Fields (on page 125).)

The steps required to implement this example are as follows:

1. Configure the following validation rule for the Probability field:

   ```
   < 40 OR ([<Probability>]>= 40 AND [<Revenue>]> 0)
   ```

   Note that you do not use the percentage sign (%).

2. Add a validation error message such as the following to the Probability field:

   Revenue must be greater than 0 when the probability is greater than or equal to 40%.

3. Configure the following validation rule for the Revenue field:

   ```
   (> 0 AND [<Probability>]>= 40) OR [<Probability>]< 40
   ```

4. Add a validation error message such as the following to the Revenue field:

   Revenue must be greater than 0 when the probability is greater than or equal to 40%.

Using Dependent Fields in Expressions

A *dependent field* is a joined field whose values depend on a foreign key. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. An example of a dependent field is the AccountName field on the Opportunity record type. The AccountName field on the Opportunity record type is a joined field whose values depend on the AccountId foreign key field, which references the Account record type.

If your expression has to determine the value of a dependent field, then it is recommended that you use the JoinFieldValue function and get the most recent value of the field by referring to the ID field; that is, the foreign key field. Otherwise, the results of your expression might be incorrect, and the outcome of the expression value might be invalid. For more information about joined fields and the JoinFieldValue function, see JoinFieldValue (on page 874).

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Data Types in Expression Builder

This topic describes the data types in Oracle CRM On Demand, and how they are used in Expression Builder.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases

earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Data Types in Oracle CRM On Demand

The following table shows the data type returned when an Oracle CRM On Demand field is used in an expression. To get the value of a field, use the [{FieldName}] syntax or the [<FieldName>] syntax.

Oracle CRM On Demand Field Type	Return Type in Expressions
Integer	Integer
Picklist	String
Currency	Currency
ID	String
Text	String
Check box	Boolean. For example, you can use [<Active>] directly in places where conditions are expected. You can also use FieldValue('<Active>') = 'Y'.
Date	Date
Date Time	Date Time
Number	Number

Data Type Arithmetic

When a statement references more than one field value and the fields have different data types, the order of the data types can affect the calculation. When an operator (other than the exponent operator) is applied to two operands of two different data types, the operand on the right side of the operator is converted to the data type of the operand on the left side before the operation is evaluated. For example, if CloseDate is 02/09/2007, the following expression:

```
PRE('<CloseDate>') + 30
```

evaluates to 02/09/200730. Therefore, the following condition:

```
[<CloseDate>] > PRE('<CloseDate>') + 30
```

is syntactically valid, but its meaning is invalid. The condition is correctly written as follows:

```
[<CloseDate>] - 30 > PRE('<CloseDate>').
```

NOTE: When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

The following tables show the possible results of the various arithmetic operations, using the example values.

Field	Data Type	Example Value
Quantity	Integer	5
Item Price	Currency	2.25

Calculation	Result	
	Value	Data Type
[<Item Price>] + [<Quantity>]	7.25	Currency
[<Quantity>] + [<Item Price>]	7	Integer
[<Item Price>] - [<Quantity>]	(2.75) **NOTE:** For currency fields, brackets indicate that the value is negative.	Currency
[<Quantity>] - [<Item Price>]	3	Integer
[<Item Price>] * [<Quantity>]	11.25	Currency
[<Quantity>] * [<Item Price>]	10	Integer
[<Item Price>] / [<Quantity>]	0.45	Currency
[<Quantity>] / [<Item Price>]	2.50	Currency

When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

In this example (where Quantity is an integer field, value 5 and Item Price is a currency field, value 2.25), if the operand on the right side of the operator was converted to the data type of the operand on the left side, the expected value of Quantity ^ Item Price would be 25, and the expected data type would be integer. However, the results are shown in the following table.

Calculation	Result	
	Value	Data Type
[<Item Price>] ^	57.67	Currency

Calculation	Result	
	Value	Data Type
[<Quantity>]		
[<Quantity>] ^ [<Item Price>]	37.38	Currency

The negation operator (minus sign [-]) is also supported in Expression Builder. For example:

Calculation	Result	
	Value	Data Type
-1 * [<ItemPrice>]	(2.25)	Currency

If you convert a number to a string, the calculation does not work correctly. For example:

Calculation	Result		Description
	Value	Data Type	
1234 + abcd	1234	Number	The string "abcd" evaluates to the number 0 and is then added to 1234.
abcd + 1234	abcd1234	String	The number 1234 evaluates to the string "1234" and is appended to the string "abcd".

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Expression Builder Operators

This topic describes the operators that you can use in Expression Builder, and the order in which they are evaluated.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or

later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Arithmetic Operators

The following table describes the purpose of each arithmetic operator and gives an example of how it is used.

Operator	Purpose	Example
+	Add	[<Record Number>] + 1
-	Subtract	[<Record Number>] - 1
-	Negate	[<Revenue>] < -100
*	Multiply	[<Subtotal>] * 0.0625
/	Divide	[<Total Items>] / [<Total Orders>]
^	Exponent	[<Grid Height>] ^ 2

Logical Operators

The following truth table shows the possible results from the logical operators in Expression Builder.

Logical Operator	First Operand	Second Operand	Result
NOT	TRUE		FALSE
	FALSE		TRUE
	NULL		NULL
AND	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	FALSE
	FALSE	TRUE	FALSE
	TRUE	NULL	NULL
	FALSE	NULL	FALSE
	NULL	TRUE	NULL

Logical Operator	First Operand	Second Operand	Result
	NULL	FALSE	FALSE
	NULL	NULL	NULL
OR	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	TRUE
	FALSE	TRUE	TRUE
	TRUE	NULL	TRUE
	FALSE	NULL	NULL
	NULL	TRUE	TRUE
	NULL	FALSE	NULL
	NULL	NULL	NULL

Comparison Operators

The following table describes the purpose of each comparison operator and gives an example of how it is used.

Operator	Purpose	Example
=	Tests that the first operand is equal to the second operand.	[<Last Name>] = "Smith"
< >	Tests that the first operand is not equal to the second operand.	[<Role>] <> "End-User"
>	Tests that the first operand is greater than the second operand.	[<Revenue>] > 5000
<	Tests that the first operand is less than the second operand.	[<Probability>] < .7
> =	Tests that first operand is greater than or equal to the second operand.	[<Revenue>] >= 5000
< =	Tests that the first operand is less than or equal to the second operand.	[<Probability>] <= .7

Operator	Purpose	Example
LIKE	Tests that the value of the first operand matches the specified string.	[<Last Name>] LIKE "Smith" **TIP:** You can use the asterisk (*) and question mark (?) pattern matching special characters with the LIKE operator.
NOT LIKE	Tests that the value of the first operand does not match the specified string.	[<Last Name>] NOT LIKE "Smith" or NOT ([<Last Name>] LIKE "Smith") **NOTE:** The brackets are required in the second example. **TIP:** You can use the asterisk (*) and question mark (?) pattern matching special characters with the NOT LIKE operator.
IS NULL	Tests that the operand is null.	[<Last Name>] IS NULL
IS NOT NULL	Tests that the operand is not null.	[<Last Name>] IS NOT NULL

Pattern Matching Special Characters

The following table describes the pattern matching special characters. These special characters can be used with the LIKE and NOT LIKE comparison operators.

Character	Purpose	Example
*	Zero or more characters	[<Last Name>] LIKE "Sm*" returns all records where the [<Last Name>] value starts with the characters *Sm*, as in *Smith*, *Smythe*, *Smart,* and so on. [<Last Name>] LIKE "*om*" returns all records where the [<Last Name>] field contains the characters *om*, as in *Thomas*, *Thompson*, *Tomlin*, and so on.

?	One character	[<First Name>] NOT LIKE "Da?" returns all records where the [<First Name>] value is three characters long and does not start with the letters *Da*. Records with *Ted*, *Tom* and *Sam* are returned, but *Dax* and *Dan* are not. NOT ([<First Name>] LIKE "?o?") returns all records where the [<First Name>] value is three characters long and does not have as its middle character *o*. Records with *Ted* and *Sam* are returned, but *Tom* and *Bob* are not.

Concatenation Operator

The + (plus) operator is used in emails to concatenate field values and text.

Precedence of Operators

Precedence is the order in which Oracle CRM On Demand evaluates the various operators within a single expression. The following rules apply:

- Operators with higher precedence are evaluated before operators with lower precedence.
- Operators with equal precedence are evaluated from left to right.
- Lower-level numbers indicate higher precedence.
- The use of parentheses affects the order of precedence within an expression. The expression within parentheses is evaluated before the expression outside the parentheses.

The levels of precedence are listed in the following table.

Level	Operator
1	( )
2	- (negation)
3	^ (exponentiation)
4	* (multiplication), / (division)
5	+ (addition), - (subtraction), NOT logical operator
6	AND logical operator
7	OR logical operator
8	=, <>, >, <, >=, <= comparison operators

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)

- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Expression Builder Functions

The following table lists the functions that you can use in Expression Builder. Click the name of a function to see more information about the function.

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
IfNull (on page 869)	Duration (on page 863)	FieldValue (on page 866)	Locale (on page 883)	ExcludeChannel (on page 865)	LN (on page 882)
IIf (on page 870)	JulianDay (on page 876)	FindNoneOf (on page 867)	LocaleListSeparator (on page 884)	GetGroupId (on page 869)	
IsValidRowId (on page 873)	JulianMonth (on page 877)	FindOneOf (on page 868)	OrganizationName (see "OrganisationName" on page 889)	JoinFieldValue (on page 874)	
	JulianQtr (on page 878)	InStr (on page 872)	UserValue (on page 899)	LookupName (on page 884)	
	JulianWeek (on page 879)	Left (on page 880)		LookupValue (on page 885)	
	JulianYear (on page 880)	Len (on page 881)		PRE (on page 889)	
	Timestamp (on page 894)	Lower (on page 886)		RowIdToRowNum (on page 892)	
	Today (on page 897)	Mid (on page 887)		RowNum (on page 893)	
	UtcConvert (on page 903)	Right (on page 891)			
		ToChar (on page 895)			

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
		Upper (on page 898)			

Note the following information regarding other functions:

- Some of the functions listed in the drop-down list on the Functions field in Expression Builder are for internal use only. Do not use the following functions in your expressions:
  - GetParentId
  - IsManagerPosition
  - Lookup
  - LookupMessage
  - LOVLanguage
  - PositionId
  - PositionName
- It is recommended that you use the UserValue (on page 899) function instead of the functions listed in the following table. These functions will become obsolete.

Function	Recommended Alternative
Alias	UserValue('<Alias>')
Currency	UserValue('<CurrencyCode>')
DivisionName	UserValue('<Division>')
FirstName	UserValue('<FirstName>')
JobTitle	UserValue('<JobTitle>')
Language	UserValue('<LanguageCode>')
LanguageName	UserValue('<Language>')
LastName	UserValue('<LastName>')
LocalCurrency	UserValue('<CurrencyCode>')
LocaleName	UserValue('<Locale>')
LoginId	UserValue('<UserId>')
LoginName	UserValue('<UserSignInId>')

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)

Duration

The Duration function in Expression Builder returns a number that indicates a period in days or fractions of days as indicated by the period argument.

Syntax

Duration(period)

Result Type

Number

Arguments

The following table describes the arguments for the function.

Argument	Description
period	Specifies the period that is to be returned. The value can be a string literal in the format P*n*Y*n*M*n*DT*n*H*n*M, or an expression that evaluates to a string in the format P*n*Y*n*M*n*DT*n*H*n*M. In the P*n*Y*n*M*n*DT*n*H*n*M string: ■ P is the period indicator ■ *n*Y specifies the number of years ■ *n*M specifies the number of months ■ *n*D specifies the number of days ■ T separates the date and time specifications ■ *n*H specifies the number of hours ■ *n*M specifies the number of minutes For example, assume that you want to specify a period of 50 months. You can specify the period as a string literal, for example, as P4Y2M, or as P50M. Alternatively, if you want to specify a period that varies depending on a value in a field, then you can use that field in an expression in the argument. In the following example, Deferral Period is a custom field that is set up to store a value for a period in months. The value in the

Argument	Description
	Deferral Period field is used to calculate the period: `Duration('P'+ FieldValue([{nDeferral_Period}])+'M')` So, if the value in the Deferral Period field is 12, then the expression evaluates to P12M, which is a valid string for the argument. If the value in the Deferral Period field is 50, then the expression evaluates to P50M, which is also a valid string. You can specify any number of years, months, days, hours, or minutes in the string literal. Similarly, if the argument contains an expression, there is no limit on the number that can be returned by the expression.

The following considerations apply to the period argument:

- Do not specify a plus sign (+) for positive values.
- You can specify a negative duration as -Duration(period) or Duration(-period).
- Specifying seconds is not supported.
- If the number of years, months, days, hours, or minutes is zero, you can omit the number and its corresponding designator.
- If none of the time components are present in the period, the T designator must not be included in the period.
- The designator *P* must always be present in the period.

Examples

The following are valid examples of the Duration function:

```
Duration('P0Y1M1DT2H5M')

Duration('P0Y0DT1H')

Duration('P1D')

Duration('P0Y0M0DT0H0M')

Duration('P0DT1M')

Duration('P24M')

Duration('P500D')

Duration('P'+ FieldValue([{nDeferral_Period}])+'M')

Duration(‘PT1000H3M’)

Duration(‘-P1Y200M’)
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

ExcludeChannel

The ExcludeChannel function in Expression Builder returns FALSE if the specified channel name is the channel that the request came from.

Syntax

ExcludeChannel(channel name)

Result Type

Boolean

Arguments

The following table describes the arguments for the function.

Argument	Description
channel name	The name of the channel to be excluded.

The following table describes the valid strings for use in the channel name argument. The strings are case-sensitive.

Channel Name String	Description
Import	This channel string excludes updates performed through the import functionality and through Oracle Data Loader On Demand.
Online	This channel string excludes updates performed by user interactions through browser windows.
Mass Update	This channel string excludes updates performed through the Mass Update option on list pages.
Record Merge	This channel string excludes updates performed by record merges.

Channel Name String	Description
Web Services	This channel string excludes updates from Web services.
Office	This channel string excludes updates from Oracle CRM On Demand Integration for Office.
OEI	This channel string excludes updates from Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand.
Desktop	This channel string excludes updates from Oracle CRM On Demand Desktop.
Rest	This channel string excludes updates from REST API calls.
Mobile	This channel string excludes updates from Oracle CRM On Demand Connected Mobile Sales.

Examples

The following example stops a process from being triggered by a Web service request:

```
ExcludeChannel("Web Services")
```

The following example stops a process from being triggered by an import operation or Oracle Data Loader On Demand:

```
ExcludeChannel("Import")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

FieldValue

The FieldValue function in Expression Builder returns the value of a field as a string.

Syntax

FieldValue('<field_name>')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
field_name	The valid XML name or customised integration tag corresponding to the chosen field. Integration tags are displayed in the Integration Tag Web Services v2.0 column in the *record type* Fields page.

Examples

The following example:

```
FieldValue('<CreatedDate>')
```

returns the value of the Created Date field as a string.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

FindNoneOf

The FindNoneOf function in Expression Builder returns the position of the first instance in the first argument (string1) that does not match any character in the second argument (string2).

Syntax

FindNoneOf(string1, string2)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

Examples

The following example returns the value 4:

```
FindNoneOf ("abcdef", "abc")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

FindOneOf

The FindOneOf function in Expression Builder returns the position of the first instance in the first argument (string1) of a character in the second argument (string2).

Syntax

FindOneOf(string1, string2)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

Examples

The following example returns the value 3:

```
FindOneOf ("abcdef", "xyzc")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

GetGroupId

The GetGroupId function in Expression Builder returns the Oracle CRM On Demand calendar-sharing group.

Syntax

GetGroupId()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

IfNull

The IfNull function in Expression Builder returns the value from the first argument that is passed to the function. If the first argument returns NULL, the value from the second argument is returned.

Syntax

IfNull(expr1, expr2)

Result Type

The result type of the IfNull function is the type of its first argument, even if the first argument is NULL. The second argument is converted to the type of the first argument before its value is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
expr1	A field name or expression.
expr2	The field name or expression that is returned if expr1 is NULL.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

IIf

The IIf function in Expression Builder returns one of two parameters based on the evaluation of a conditional expression. IIf is an abbreviation for Immediate If.

Syntax

IIf(expr, result_if_true, result_if_false)

Alternate Syntax

IIf(expr, expr_if_true, expr_if_false)

Mixed Syntax

IIf(expr, result_if_true, expr_if_false)

IIf(expr, expr_if_true, result_if_false)

Result Type

The result type of the IIf() function is always the type of its first argument. If the expression evaluates to FALSE, the second argument is converted to the type of the first argument before its value is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
expr	The conditional expression that is to be evaluated.
result_if_true	The return value if the conditional expression evaluates to true.
result_if_false	The return value if the conditional expression evaluates to false.
expr_if_true	An expression to be evaluated if the conditional expression evaluates to true.
expr_if_false	An expression to be evaluated if the conditional expression evaluates to false.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Examples

The following is an example of mixed syntax in the IIf function:

A business process requires that the Region field on an account detail page is to be updated when the Invoicing County field is changed as follows:

If the Invoicing County field is changed to OK or TX, the region field is to be updated to Central. If the Invoicing County field is changed to CA, the Region field is to be updated to West. For all other counties, the Region field is to be updated to East.

```
IIf([<PrimaryBillToState>]='OK' OR [<PrimaryBillToState>]='TX', 'Central',
IIf([<PrimaryBillToState>]='CA', 'West', 'East'))
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)

- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

InStr

The InStr function in Expression Builder returns the position of the first occurrence of one string within another.

Syntax

Instr(string1, string2, start, end)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	Specifies the string that is to be searched. The value can be a string literal or a field name or an expression that returns a string.
string2	Specifies the string that is to be searched for. The value can be a string literal or a field name or an expression that returns a string. **NOTE:** The search for a string is case-sensitive.
start	(Optional) An integer that specifies the start point in string1.
end	(Optional) An integer that specifies the end point in string1.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Examples

The following example returns the value 9:

```
InStr('john.doe@company.com','@')
```

The following example shows how the InStr function can be used in a workflow rule condition. In the workflow rule condition, the InStr function is used to determine if a specified string appears in a field on the record. If the string is found in the field, then the actions specified on the workflow rule are performed. In this example, the InStr function determines if the Subject field in a record contains the word *REVIEW*. The action on the workflow rule is performed only if the Subject field contains the word *REVIEW* in uppercase letters.

```
InStr([<Subject>], 'REVIEW') > 0
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

IsValidRowId

The IsValidRowId function in Expression Builder queries records of a specified record type to determine if a certain row ID exists, and returns a Boolean value (TRUE or FALSE). If the row ID exists but the record is marked for deletion, then the IsValidRowId function returns FALSE.

Syntax

IsValidRowId(record_type, 'row_id')

Result Type

Boolean (TRUE or FALSE).

Arguments

The following table describes the arguments for the function.

Argument	Description
record_type	The language-independent name of the record type. (A *language-independent name* is a name that does not change when the user language changes.) The argument must be enclosed in field string identifiers. For example:

Argument	Description
	'<Contact>'
row_id	The string literal, field name or expression that returns an alphanumeric row ID.

Examples

The following example determines if the value in the Row Id field on a contact record is a valid row ID for a contact record:

```
IsValidRowId('<Contact>', [{Id}])
```

The following example determines if the value 12-Y09KG is a valid row ID for an account record:

```
IsValidRowId('<Account>', '12-Y09KG')
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

JoinFieldValue

A record type can be referenced by another record type through a foreign key. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. For example, on most record types, the OwnerId field is a foreign key that references the User record type. The Owner field on many records is a joined field that uses the OwnerId foreign key to reference the Alias field on the User record type.

The JoinFieldValue function in Expression Builder returns the value of a joined field when the referenced record type and the related foreign key fields are specified in the function. The JoinFieldValue function can also retrieve other fields on the referenced record type that are not directly joined to the referencing object, which allows you to look up fields across record types from related record types.

If the ID field of a referenced record type is present as a foreign key on the record type on which you configure a workflow rule, then you can use the JoinFieldValue function to retrieve field values from the referenced record type.

Also, you can use the following foreign key fields, which are available on all record types, to retrieve field values from the User record type:

- CreatedById
- ModifiedById

NOTE: The JoinFieldValue function cannot return the values of the following fields in the Activity record type: Disbursement Transaction Count, Product Detailed Count, Promotional Items Dropped Count, and Samples

Dropped Count. This limitation is due to the way that Oracle CRM On Demand calculates the values of these fields.

Syntax

JoinFieldValue (ref_record_type, foreign_key, field_name)

Result Type

String.

If an error occurs or the requested field value is empty, a zero-length string is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
ref_record_type	The language-independent name of the referenced record type. (A *language-independent name* is a name that does not change when the user language changes.) The argument must be enclosed in field string identifiers. For example: `'<Account>'`
foreign_key	A literal or expression that returns a valid row ID in the referenced record type (specified in the ref_record_type argument). If the row ID is invalid, the function returns a zero-length string. Direct field references must be enclosed in field identifiers. For example: `[<AccountId>]`
field_name	The language-independent name of a field in the referenced record type (specified by the ref_record_type argument). If the field does not exist in the referenced record type, an error is returned. The field name must be enclosed in field string identifiers. For example: `'<Type>'`

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder,

so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Examples

Example 1: A business process requires a workflow rule to look up the name of the new owner when the owner of a record is changed. When the owner of a record is changed, only the OwnerId foreign key field on the record is updated. As a result, the following condition on a workflow rule does not look up the new owner of the record:

```
PRE('<Owner>') <> [<Owner>]
```

Instead, you can use the following condition in the workflow to look up the new owner of the record:

```
PRE('<Owner>') <> JoinFieldValue('<User>',[<OwnerId>],'<Alias>')
```

Example 2: To get the email address of the previous owner of a record, use the following expression:

```
JoinFieldValue('<User>',PRE('<OwnerId>'),'<EMailAddr>')
```

Example 3: To get the email address of the current owner of a record, use the following expression:

```
JoinFieldValue('<User>',[<OwnerId>],'<EMailAddr>')
```

Example 4: A business process requires that a service request email is sent to a contact. Before the email is sent, the workflow rule checks that the contact has agreed to receive emails. The workflow rule (based on the service request record type) has the following condition:

```
JoinFieldValue('<Contact>',[<ContactId>],'<NeverEmail>')<> 'Y'
```

Example 5: To get the territory of the primary account for a service request, use the following expression:

```
JoinFieldValue('<Territory>', JoinFieldValue('<Account>', [<AccountId>],
'<TerritoryId>'),'<TerritoryName>')
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

JulianDay

The JulianDay function in Expression Builder returns the number of days that have elapsed since noon Universal Time, January 1, 4713 BC.

Syntax

JulianDay(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianDay(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

JulianMonth

The JulianMonth function in Expression Builder returns an integer that is equal to:

JulianYear * 12 + *current_month*

where *JulianYear* is the year that is returned by the JulianYear (on page 880) function, *current_month* is an integer from 1-12, and January is 1.

Syntax

JulianMonth(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type.

Argument	Description
	To return the value for today's date, use the following syntax: JulianMonth(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

JulianQtr

The JulianQtr function in Expression Builder returns an integer that is equal to:

JulianYear * 4 + *current_quarter*

where *JulianYear* is the year returned by the JulianYear (on page 880) function, and *current_quarter* is:

(*current_month* - 1) / 3 + 1

rounded down to the next integer.

Syntax

JulianQtr(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianQtr(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

JulianWeek

The JulianWeek function in Expression Builder returns an integer that is equal to:

JulianDay / 7

rounded down to the next integer, where *JulianDay* is the day that is returned by the JulianDay (on page 876) function.

Syntax

JulianWeek(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianWeek(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

JulianYear

The JulianYear function in Expression Builder returns an integer that is equal to:

current_year + 4713

Syntax

JulianYear(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianYear(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Left

The Left function in Expression Builder returns a specified number of characters from the left side of a string.

Syntax

Left(string, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the leftmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to be returned. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

Examples

If the current user's email address is john.doe@oracle.co.uk, the following example returns the value john:

```
Left(UserValue('<EMailAddr>'), 4)
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Len

The Len function in Expression Builder returns the number of characters in a specified string.

Syntax

Len(string)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are counted. If the string is blank, 0 (zero) is returned. If the string contains Null, Null is returned.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Examples

The following example returns the value 18:

```
Len("Oracle Corporation")
```

The following example returns the value 19 if the field contains a valid timestamp:

```
Len([<CreatedDate>])
```

The following example returns the value 19:

```
Len(Timestamp()) returns 19
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

LN

The LN function in Expression Builder returns the natural log of the number passed in the argument.

Syntax

LN(number)

Result Type

Number

Arguments

The following table describes the arguments for the function.

Argument	Description
number	The number for which the natural log is to be returned.

Examples

The following example:

```
LN(10)
```

returns the value 2.30.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Locale

The Locale function in Expression Builder returns the locale code for the signed-in user, for example, ENU.

Syntax

Locale()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

LocaleListSeparator

The LocaleListSeparator function in Expression Builder returns the list separator character for the current locale, for example, a comma (,).

Syntax

LocaleListSeparator()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

LookupName

The LookupName function in Expression Builder finds a row in the List of Values table where all of the following are true:

- The TYPE field matches the type argument.
- The CODE field matches the lang_ind_code argument.
- The LANG_ID field matches the language code of the currently active language.

This function returns the untranslated value (the language-independent code) of the display value in the specified List of Values.

TIP: When specifying the parameters for the LookupName function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for a variety of data that the field can hold.)

Syntax

LookupName (type, lang_ind_code)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of row to be searched for.
lang_ind_code	The display value.

Example

If CALIFORNIA is the display value and CALIF is the language independent code, both of the following examples return the value CALIF:

```
LookupName('STATE_ABBREV', 'CALIFORNIA')
```

```
LookupName('STATE_ABBREV', 'CALIF')
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

LookupValue

The LookupValue function in Expression Builder returns a specified picklist value that is translated into the currently active language.

Picklist values are stored in the List of Values table. The LookupValue function returns the value in the VAL column of a row where all of the following are true:

- The TYPE column matches the type argument.
- The CODE column matches the lang_ind_code argument.
- The LANG_ID column matches the language code of the currently active language.

The LookupValue function allows Oracle CRM On Demand to evaluate expressions involving picklist values uniformly across locales. For example, the value *White* in English is evaluated in the same way as the value *Blanc* in French.

TIP: When specifying the parameters for the LookupValue function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for different data that the field can hold.)

NOTE: The Sales Stage field in opportunity records is not a true picklist field. The LookupValue function does not work on this field.

Syntax

LookupValue (type, lang_ind_code)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.
lang_ind_code	The untranslated value in the list of values.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Lower

The Lower function in Expression Builder converts all letters in the specified string to lowercase. If there are characters in the string that are not letters, they are unaffected by this function.

Syntax

Lower(string)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	Specifies the string that is to be converted. The value can be a string literal or a field name or an expression that returns a string. If the value is a string literal, then it must be enclosed in single or double quotation marks.

Examples

If the First Name field on a contact record contains the value Amanda, then the following example returns the value amanda:

```
Lower([{First Name}])
```

The following examples both return the value account123:

```
Lower('Account123')
```

```
Lower("Account123")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Mid

The Mid function in Expression Builder returns a specified number of characters from a string.

TIP: To determine the number of characters in a string, use the Len (on page 881) function.

Syntax

Mid(string, start, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are returned. If the string contains Null, a blank string is returned.
start	The field name or expression that specifies the character position in the string at which the length count begins. If the value of the start argument is greater than the number of characters in the string, the Mid function returns a blank string.
length	Optional. The field name or expression that specifies the number of characters to return. If this argument is not used or the length specified is greater than the number of characters that can be returned, all characters from the start position to the end of the string are returned.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Examples

The following example returns seven characters (Builder), beginning with the twelfth character in a string:

```
Mid("Expression Builder is easy!!", 12, 7)
```

The following examples return seven characters, beginning with the twelfth character from a text field that contains the text: *Expression Builder is easy!!*

```
Mid('<TextFieldName>',12, 7)
```

or

```
Mid([<TextFieldName>],12, 7)
```

The following example extracts the domain name from an email address:

```
Mid([<CreatedbyEmailAddress>],FindOneOf([<CreatedbyEmailAddress>], "@") + 1,
Len([<CreatedbyEmailAddress>]))
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

OrganisationName

The OrganisationName function in Expression Builder returns the organisation name of the signed-in user.

Syntax

OrganisationName()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

PRE

The PRE function in Expression Builder returns the previous value of the specified field when the field value is modified but before the value is updated in the database.

CAUTION: It is strongly recommended that you do not use the PRE function with workflow rules containing a Wait action, because the Wait action affects the PRE function. Any actions following the Wait action are not performed until the specified wait period has expired. The remaining actions are performed in a different batch operation than the operation where the rule was originally triggered, and the values of the fields on the record prior to the action that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of the field are always considered to be the same.

Syntax

PRE('<fieldname>')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
fieldname	The name of the field that was modified.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

The following considerations apply when using the PRE function:

- In conditional expressions, such as workflow conditions and validation statements, when you use the PRE function to retrieve the previous value of a field, remember that the initial value of the field can be blank (that is, a null value). If the initial value is null, any comparison with a non-null value results in unpredictable behaviour. To ensure that conditional expressions are evaluated correctly in such cases, use the PRE function with the IfNull function as shown in this example:

  IfNull([<FieldName>], "Invalid") <> IfNull(PRE('<FieldName>'), "Invalid")

  In this example, the text string *Invalid* is used to replace the null value, but you can use any string that you want, provided that the string does not exist as a value in the field that is being examined.

- If the PRE function is used in a workflow rule or action that is invoked after a Wait action, the function does not return the previous value of a field. However, you might have a business process that requires such comparisons. In such cases, you can use a workflow rule with the Before Modified Record Saved trigger event to store the previous value of a field in any unused field on the record type. You can then use the stored field value for any comparisons you require in workflow rules that have the Wait action.

  When you create the workflow rule to store the previous value of a field in an unused field on the record type, remember that the previous value of the original field might be blank (that is, a null value). Therefore, you must use an expression such as the following to store a default value if a null value is encountered:

  IfNull([<FieldName>], "Invalid")

  In this example, the text string *Invalid* is the default value that is used to replace a null value, but you can use any string you want, provided that the string does not exist as a value in the original field.

Example of Creating a Workflow Rule That Sends an Email to the Previous Owner of an Account Record

The following is an example of how to create a workflow rule that sends an email to the previous owner of an account record when the owner of the record is changed.

To create a workflow rule that sends an email to the previous owner of an account record

1. Create a workflow rule for the Account record type with the When Modified Record Saved trigger event.
2. Save the workflow rule.
3. Create an Add an Email action on the workflow rule.
4. On the workflow action, do the following:
   a. In the To field, select Specific Email Address.
   b. In the To field expression text box, add the following expression:
      JoinFieldValue('<User>', IfNull(PRE('<OwnerId>'), "admin@mycompany.com"),'<EMailAddr>')
   c. Add the necessary text in the subject and body of the email.
   d. Save the workflow action.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Right

The Right function in Expression Builder returns a specified number of characters from the right side of a string.

Syntax

Right(string, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description

Argument	Description
string	The string from which the rightmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to be returned. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

Examples

If the current user's email address is john.doe@oracle.co.uk, the following example returns the value oracle.co.uk:

```
Right(UserValue('<EMailAddr>'), Len(UserValue('<EMailAddr>'))-
InStr(UserValue('<EMailAddr>'),'@'))
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

RowIdToRowNum

The RowIdToRowNum function in Expression Builder converts an alphanumeric Row ID to a numeric format.

NOTE: Row IDs are generated by Oracle CRM On Demand using a proprietary algorithm, and have full referential integrity across the Oracle CRM On Demand database. The algorithm uses Base-36 encoding, a positional numeral system where the radix is 36. Using 36 as the radix allows the digits to be represented by the numbers 0 to 9 and the letters A to Z, which is an optimised, case-insensitive alphanumeric numeral system, based on ASCII characters.

Syntax

RowIdToRowNum('row_id')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
row_id	The string literal, field name or expression that returns an alphanumeric row ID.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 849).

Examples

The following example:

RowIdToRowNum('12-6RX8L').

returns the value 38-8021253.

The following example:

RowIdToRowNum('12-Y09KG')

returns the value 38-57119344.

If the <AccountID> field contains '12-Y09KG', the following example:

RowIdToRowNum('<AccountID>')

returns the value 38-57119344.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

RowNum

The RowNum function in Expression Builder returns the position of the record within the active set of records.

Syntax

RowNum()

Result Type

Integer

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Timestamp

The Timestamp function in Expression Builder returns the server date and time converted to the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) - 0400 UTC, the Timestamp function converts the server time to EDT. The TimeStamp function performs UTC (universal time code) conversion.

NOTE: Arithmetic operations (for example, add or subtract) are not supported with the Timestamp() function.

Syntax

Timestamp()

Result Type

Date Time

Examples

The following example returns the current date and time, in the format month/day/year hours24:minutes:seconds:

```
Timestamp()
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)

Expression Builder Functions (on page 861)

ToChar

The ToChar function in Expression Builder converts a specified date or numeric expression to a formatted string.

Syntax

ToChar(expression, format)

CAUTION: Do not use both date formats and number formats in an instance of the ToChar function. Doing so can lead to invalid results.

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
expression	An expression or field that returns a date, date and time, or a numeric value.
format	A string that represents the date or number format.

The following table describes the date formats for the function.

Format Code	Description
DD	A two-digit day of month (01-31).
DDDD dddd	The name of the day.
MM	A two-digit month number (01-12 where 01 is JAN). You must use *MM* in uppercase, because *mm* in lowercase indicates minutes.
MMMM mmmm	The name of the month. Note that if you use lowercase, you must use mmmm (that is, the letter m in lowercase, four times), because mm (that is, the letter m in lowercase, twice) indicates minutes.
Y	The last digit of the year.

Format Code	Description
YY	The last two digits of the year.
YYYY	A four-digit year.
hh12	The hour of day in 12-hour format.
hh24	The hour of day in 24-hour format.
hh	The hour of the day. You can specify AM or PM to adjust the time accordingly, for example: hh:mm:ss PM If you do not specify AM or PM, the 24-hour format is used by default.
mm	The minutes. Note that mm (that is, the letter m in lowercase, twice) always indicates minutes and cannot be used to specify a two-digit day of the month.
ss	The seconds.

The following table describes the number formats for the function.

Format Code	Example	Description
#	####	Returns the value with the specified number of digits, with a leading minus sign if the value is negative.
0	####.00	Returns leading zeros. Returns trailing zeros.
$	$###.00	Returns the value with a leading dollar sign.
,	#,###	Returns a comma in the specified position. A comma cannot appear to the right of the decimal point. The format model must not begin with a comma.
.	###.##	Returns a decimal point in the specified position. Only one decimal point is allowed in the format parameter. If the number of digits specified after the decimal point is less than the number of digits available after the decimal point, the decimal will be rounded up.

Examples Using Number Formats

The following example returns the value 10:

```
ToChar (10, '##.##')
```

The following example returns the value 10:

```
ToChar (10, '##.00')
```

The following example returns the value 10.24:

```
ToChar (10.2388, '##.00')
```

The following example returns the value -10.24

```
ToChar (-10.2388, '##.##')
```

Examples Using Date Formats

The following example converts the value returned by the Timestamp() function into DD/MM/YYYY format:

```
ToChar(Timestamp(),'DD/MM/YYYY')
```

For example, if the Timestamp() function returns a value of 02/29/2008 10:58:37, the previous expression evaluates to 29/02/2008.

The following examples show how midnight is shown using various formats:

ToChar(Today(), YYYY/MM/DD hh:mm:ss PM) returns 2009/05/22 12:00:00 AM

ToChar(Today(), YYYY/MM/DD hh:mm:ss) returns 2009/05/22 00:00:00

ToChar(Today(), YYYY/MM/DD hh24:mm:ss PM) returns 2009/05/22 00:00:00

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Today

The Today function in Expression Builder returns today's date based on the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Today() function converts the server day to EDT. The Today() function performs UTC (universal time code) conversion.

Syntax

Today()

Result Type

Date

Examples

If the current date is 11/27/2007, the following example:

```
Today() - 30
```

returns the value 10/28/2007.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Upper

The Upper function in Expression Builder converts all letters in the specified string to uppercase. If there are characters in the string that are not letters, they are unaffected by this function.

Syntax

Upper(string)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	Specifies the string that is to be converted. The value can be a string literal or a field name or an expression that returns a string. If the value is a string literal, then it must be enclosed in single or double quotation marks.

Examples

If the First Name field on a contact record contains the value Amanda, then the following example returns the value AMANDA:

```
Upper([{First Name}])
```

The following examples both return the value ACCOUNT123:

```
Upper('Account123')
```

```
Upper("Account123")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

UserValue

The UserValue function in Expression Builder returns the value of a specified attribute for the current user.

The fields on the User Detail view are attributes of the selected user.

Syntax

UserValue('<attribute>')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
attribute	The language-independent name or customised integration tag that corresponds to the display name of the current user attribute. Integration tags are displayed in the Integration Tag Web Services v2.0 column in the *record type* Fields page.

Examples

Example 1: A business process requires that a custom text field called Origin on a service request is to display by default the country of the user who creates the record (the current user) when the record is created.

To implement the business rule, in the Field Setup page for service requests, set the default value for the Origin field to UserValue('<PersonalCountry>') and select the Post Default checkbox.

For information on creating and editing fields, see Creating and Editing Fields (on page 125).

Example 2: A business process requires that a certain workflow rule is triggered if the owner of an opportunity is not the administrator.

To implement the business rule, set up the following condition on the workflow rule:

UserValue('<EMailAddr>') <> 'administrator@testdata.com'

Attributes

The following table lists the attributes that can be used as arguments in the UserValue function, and their corresponding display names.

Attribute	Display Name	Sample Value
Alias	Alias	Admin
AuthenticationType	Authentication Type	User ID/Password Only
BusinessUnit	Business Unit	Business Unit
BusinessUnitLevel1	Business Unit Level 1	Business Unit L1
BusinessUnitLevel2	Business Unit Level 2	Business Unit L2
BusinessUnitLevel3	Business Unit Level 3	Business Unit L3
BusinessUnitLevel4	Business Unit Level 4	Business Unit L4
CellPhone	Cellular Phone #	+1 555 2368978
CreatedBy	Created By	Oracle CRM On Demand CSR Admin
CreatedById	Not available	1E1263-IZBZ
CreatedDate	Created Date	01/08/2007 21:21:33
CurrencyCode	Currency	USD
Department	Department	Department
Division	Division	Division
EMailAddr	Email	john.doe@oracle.com
EmployeeNumber	Employee Number	12345
EnableTeamContactsSync	Enable Sync of Team Contacts	Y

Attribute	Display Name	Sample Value
ExternalIdentifierForSingleSignOn	External Identifier for Single Sign-On	UID=ADMIN,O=ORACLE
ExternalSystemId	External Unique ID	EXTUID123
FirstName	First Name	John
FundApprovalLimit	Fund Approval Limit	50000
IntegrationId	Integration ID	INTUID123
JobTitle	JobTitle	Product Manager
Language	Language	English-American
LastLoggedIn	Last Sign In	10/31/2007 19:39:01
LastName	Last Name	Doe
LeadLimit	Lead Limit	2345679
Locale	Locale	English - Canada
ManagerFullName	Reports To	John Smith
ManagerId	Not available	1E4763-IZAU
Market	Market	Market
MiddleName	Middle Name	Middle
MiscellaneousNumber1	Miscellaneous Number 1	2312
MiscellaneousNumber2	Miscellaneous Number 2	2312
MiscellaneousText1	Miscellaneous Text 1	DUNS # (Webcat) = 10461
MiscellaneousText2	Miscellaneous Text 2	a7cff064-6566-47a2-8629-8b32d92de222
ModifiedBy	Modified By	John Doe
ModifiedById	Not available	1E1263-IZBZ
ModifiedDate	Modified Date	10/31/2007 19:32:58
MrMrs	Mr/Ms	Mr.
NeverCall	Never Call	Y
NeverEmail	Never Email	Y
NeverMail	Never Mail	Y
PasswordState	Password State	Active

Attribute	Display Name	Sample Value
PersonalCity	City	Toronto
PersonalCountry	Country	Canada
PersonalPostalCode	Postal Code	M4C2C3
PersonalProvince	Province	Ontario
PersonalState	State/Province	CA
PersonalStreetAddress	Street	555 Main Avenue
PersonalStreetAddress2	Address 2	Suite 17
PersonalStreetAddress3	Address 3	Scarborough
PhoneNumber	Work Phone #	+1 555 2365555
PrimaryDivisionName	Primary Division	Asia Division
PrimaryGroup	Primary Group	User Group A
PrimaryPvgName	Not available **NOTE:** The PrimaryPvgName attribute returns the name of the picklist value group that is associated with the user's primary division.	India PVG
Region	Region	My Region
Role	Role	Field Sales Rep
RoleId	Role Id	1E1263-IYG1
SecondaryEmail	Secondary Email	john.doe2@oracle.com
ShowWelcomePage	Show Welcome Page on Sign In	N
Status	Status	Active
SubMarket	Submarket	My submarket
SubRegion	Subregion	My sub region
TempPasswordFlag	Email Temporary Password When I Click Save	Y
TimeZoneName	Time Zone	(GMT-05:00) Eastern Standard Time (US & Canada)

Attribute	Display Name	Sample Value
UserId	Row Id	1E1263-IZAU
UserLoginId	Row Id	1E1263-IZAU
UserSignInId	User Sign-In ID	PTE169-14/ADMIN
WorkFax	Work Fax #	+1 555 2365556

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

UtcConvert

The UtcConvert function in Expression Builder converts the specified date and time from the current user's time zone setting, and returns the date and time in the specified time zone.

Syntax

UtcConvert(utc_date_time, time_zone)

Result Type

Time

Arguments

The following table describes the arguments for the function.

Argument	Description
utc_date_time	The date and time according to the current user's time zone setting in the format: MM/DD/YYYY HH24:MI:SS
time_zone	The name of a time zone

Examples

If the current user's time zone setting is (GMT-05:00) Eastern Time (US & Canada), the following example:

```
UtcConvert('12/14/2007 17:07:05', 'Pacific Standard Time')
```

returns the following value:

12/14/2007 12:07:05

If the current user's time zone setting is (GMT+05:30) Calcutta, Chennai, Mumbai, New Delhi, the following example:

```
UtcConvert('12/14/2007 15:07:05', 'Eastern Standard Time')
```

returns the following value:

12/14/2007 04:37:05

The following examples show how to get the corresponding UTC time for Western European Time:

```
UtcConvert(Timestamp(),"(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna")
```

```
UtcConvert(Timestamp(),"W. Europe Daylight Time")
```

```
UtcConvert(Timestamp(),"W. Europe Standard Time")
```

The following examples show how to get the corresponding UTC time for South African Time:

```
UtcConvert(Timestamp(),"(GMT+02:00) Harare, Pretoria")
```

```
UtcConvert(Timestamp(),"South Africa Daylight Time")
```

```
UtcConvert(Timestamp(),"South Africa Standard Time")
```

If the name of a time zone contains a special character, such as a single quotation mark (') or a comma (,), you must enclose the name of the time zone, or the special character, in double quotation marks. For example:

```
%%%UtcConvert('08/03/2009 12:01:33',"(GMT+13:00) Nuku" + "'" + "alofa")%%%
```

```
%%%UtcConvert('08/03/2009 12:01:33', "(GMT+13:00) Nuku'alofa")%%%
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

Expression Builder Examples

In Expression Builder, you can use the sample expressions in the following table.

Expression Builder Sample Expressions
Update the field Opportunity Margin

Expression Builder Sample Expressions	
Description	Update the field Opportunity Margin.
Syntax	`[{cOpportunityMargin}] = [{Primary Revenue Amount}] - [{cOpportunityCost}]`
Validate new services	
Description	Field Validation. A new service cannot have revenue greater than 1,000,000.
Syntax	`<= IIf (FieldValue('{Type}') = 'New Service', 1000000, [{Primary Revenue Amount}])`
Assign a newly-created service request to the creator	
Description	When a service request is created, set the value of the Alias field on the user record of the current user as the default value for the Owner field on the service request.
Syntax	`[{Owner Alias}] = UserValue('<Alias>')`
Check if the values of specified fields have changed	
Description	Check for changes in field values.
Syntax	`PRE('{Primary Revenue Amount}') <> [{Primary Revenue Amount}]`
Trigger a workflow based on a close date	
Description	If the close date is modified by more than 30 days, execute the workflow.
Syntax	`[{Primary Revenue Close Date}] - PRE('{Primary Revenue Close Date}') > 30`
Trigger a workflow if an opportunity reaches a certain stage without a contact	
Description	If an opportunity reaches the Closed/Won sales stage without having a contact, execute the workflow.
Syntax	`FieldValue('{Sales Stage - Translation}') = "Closed/Won" AND PRE('{Sales Stage - Translation}') <> [{Sales Stage - Translation}] AND [{Key Contact Id}] = "No Match Row Id"`
Trigger a workflow when a checkbox is selected	
Description	If the custom Ready for Review checkbox field is selected, execute the workflow.
Syntax	`((FieldValue('{bCust_Ready_For_Review_Check_Box}') = 'Y') AND (PRE('{bCust_Ready_For_Review_Check_Box}') = 'N')) OR (IfNull([{bCust_Ready_For_Review_Check_Box}], 'Y') = 'Y')`

Expression Builder Sample Expressions	
Check whether the current user is the record owner	
Description	Check whether the owner of a record is the current user. In this case, the IfNull function is used because the Owner field might be null.
Syntax	`IfNull([{Owner Alias}], "Invalid") = UserValue('<Alias>')`
Trigger an email when the priority of an account is changed	
Description	Trigger an email when the value in the Account Priority field is changed from Low to High.
Syntax	`(PRE('{Type}') = "Low") AND ( FieldValue('{Type}') = "High")`
Exclude a specific channel from a workflow	
Description	Do not execute a workflow for a record that is updated through a browser window.
Syntax	`PRE('{Customer Target Type}') = "Advertisement" AND ExcludeChannel("Online")`

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 846)
- Using Expression Builder (on page 846)
- Expression Builder Functions (on page 861)

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