



# Oracle CRM On Demand

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**Configuration Guide for Oracle  
CRM On Demand Financial  
Services Edition Release 42**

**March 2021**



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# Preface

This preface introduces information sources that can help you use the application and this guide.

## Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at <http://docs.oracle.com/>.

## Contacting Oracle

### Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit [My Oracle Support](#) or visit [Accessible Oracle Support](#) if you are hearing impaired.

### Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).



# 1 What's New in This Release

## What's New in Configuration Guide for Oracle CRM On Demand Financial Services Edition, Release 42

No new features have been added to this guide for this release. This guide has been updated to reflect only product version changes.



# 2 Configuration Overview of Oracle CRM On Demand Financial Services Edition

## Configuration Overview of Oracle CRM On Demand Financial Services Edition

This chapter provides an overview of configuring Oracle CRM On Demand Financial Services Edition. It includes the following topics:

- [About Oracle CRM On Demand Industry Editions](#)
- [About Configuring Oracle CRM On Demand Financial Services Edition](#)

## About Oracle CRM On Demand Industry Editions

Oracle CRM On Demand provides industry-specific capabilities for the following industries:

- Automotive
- Financial services (for example, banking, wealth management, and insurance)
- High technology
- Life sciences

These capabilities help customers to meet industry-specific business needs.

## About Configuring Oracle CRM On Demand Financial Services Edition

If your company wants to use Oracle CRM On Demand Financial Services Edition, you must first contact Customer Care and request that the industry-specific functionality is set up for your company. This initial setup process, which is referred to as *provisioning*, is performed by Customer Care. The provisioning process for Oracle CRM On Demand Financial Services Edition exposes Web pages, features, and fields, which can differ from the standard application, but are relevant to your business.

As part of the provisioning process for Oracle CRM On Demand Financial Services Edition, Customer Care creates the Financial Administrator role, and assigns it to your company administrator. This role gives company administrators the privileges and access options that they must allow to configure the application, create other roles, and grant the same privileges and access options to those other roles, as required. These tasks are described in [Configuring Oracle CRM On Demand Financial Services Edition](#).

Customer Care can also set up other features in your application, including the following:

- Custom objects
- How your company accesses Oracle CRM On Demand
- How your company manages large volumes of data

This guide describes the tasks that are typically performed to configure Oracle CRM On Demand Financial Services Edition. The configuration settings described in this guide are suggested settings for Oracle CRM On Demand Financial Services Edition. Your company requirements might differ from the suggested settings.

This guide describes only those tasks that are specific to the configuration of Oracle CRM On Demand Financial Services Edition. For information about configuring and setting up the standard edition of Oracle CRM On Demand Financial Services Edition, see *Oracle CRM On Demand Online Help*.

# 3 Configuring Oracle CRM On Demand Financial Services Edition

## Configuring Oracle CRM On Demand Financial Services Edition

This chapter describes how to configure Oracle CRM On Demand Financial Services Edition, and set up a typical role in Oracle CRM On Demand Financial Services Edition. The chapter includes the following topics:

- *Process of Configuring Oracle CRM On Demand Financial Services Edition*
- *Configuring Field Setup for Oracle CRM On Demand Financial Services Edition*
- *Record Types for Oracle CRM On Demand Financial Services Edition*
- *Configuring Cascading Picklists for Oracle CRM On Demand Financial Services Edition*
- *Example Configuration Picklists*
- *Setting Up Page Layouts for Oracle CRM On Demand Financial Services Edition*
- *Adding an Outlook Web Applet to a Task Detail Page as Related Information*
- *Modifying Search Layouts for Oracle CRM On Demand Financial Services Edition*
- *Setting Up Related Information Page Layouts for Oracle CRM On Demand Financial Services Edition*
- *Modifying Sales Stages for Oracle CRM On Demand Financial Services Edition*
- *Setting Up Access Profiles for Financial Services Roles*
- *Creating Financial Services Roles*
- *Configuring Custom Objects for Policies*
- *Configuring Books*
- *Configuring My Team Policies List*

As part of the process of provisioning Oracle CRM On Demand Financial Services Edition, Customer Care creates the Financial Administrator role, and assigns it to your company administrator. The Financial Administrator role gives company administrators the privileges and access options that they must allow to configure Oracle CRM On Demand Financial Services Edition, create other roles, and grant the same privileges and access options to the other roles, as required.

The configuration settings described in this chapter are the suggested settings for Oracle CRM On Demand Financial Services Edition and for a typical role defined in Oracle CRM On Demand Financial Services Edition (the Financial Advisor role). Your company requirements might differ from the settings suggested in this chapter. Before you start to configure Oracle CRM On Demand Financial Services Edition, determine the fields, page layouts, access profiles, and roles that you must configure to support your company's business needs.

# Process of Configuring Oracle CRM On Demand Financial Services Edition

To configure Oracle CRM On Demand Financial Services Edition, perform the following tasks:

1. If you have not already done so, contact Customer Care, and ask a service representative to provision your application to use Oracle CRM On Demand Financial Services Edition.

When Customer Care tells you that your application has been provisioned, go to Step 2.

2. Log in to Oracle CRM On Demand.
3. Configure the field setup.

For more information, see [Configuring Field Setup for Oracle CRM On Demand Financial Services Edition](#).

4. Configure the cascading picklists.

For more information, see [Configuring Cascading Picklists for Oracle CRM On Demand Financial Services Edition](#).

5. Set up the page layouts for each role that you plan to create for Oracle CRM On Demand Financial Services Edition.

For more information, see [Setting Up Page Layouts for Oracle CRM On Demand Financial Services Edition](#).

6. Modify the search layouts.

For more information, see [Modifying Search Layouts for Oracle CRM On Demand Financial Services Edition](#).

7. Modify the sales stages.

For more information, see [Modifying Sales Stages for Oracle CRM On Demand Financial Services Edition](#).

8. Set up the access profiles for the roles that you plan to create.

For more information, see [Setting Up Access Profiles for Financial Services Roles](#).

9. Create the roles for Oracle CRM On Demand Financial Services Edition.

For more information, see [Creating Financial Services Roles](#).

10. (Optional) Configure custom objects for the Policy record.

For more information, see [Configuring Custom Objects for Policies](#).

11. (Optional) Configure books.

For more information, see [Configuring Books](#).

12. (Optional) Configure My Team Policies List.

For more information, see [Configuring My Team Policies List](#).

# Configuring Field Setup for Oracle CRM On Demand Financial Services Edition

In Oracle CRM On Demand Financial Services Edition, there are 14 record types for insurance and financial services that have preconfigured fields for use in financial services industries. You can use these fields to add additional custom fields. You can configure these record types only if it is required for your company's specific needs. The 14 record types are:

- Insurance
  - Broker Profile
  - Claim
  - Coverage
  - Damage
  - Insurance Property
  - Involved Party
  - Policy
  - Policy Holder
- Financial Services
  - Financial Account
  - Financial Account Holders
  - Financial Account Holdings
  - Financial Plan
  - Financial Product
  - Financial Transaction

For information about each of these record types, see *Oracle CRM On Demand Online Help*.

This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

## To configure field setup for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to Admin and then Application Customization.
2. In the Record Type Setup section, click the link for the required record type, for example, Contact.
3. In the Field Management section, click the required Field Setup link, for example, Contact Field Setup.
4. On the Fields page, click New Field, Rename Fields, the Edit link or the Edit Picklist link, as necessary, and set up the fields as required to support your business processes.

For more information about field types and additional properties, see *Oracle CRM On Demand Online Help*.

# Record Types for Oracle CRM On Demand Financial Services Edition

In the Oracle CRM On Demand Financial Services Edition, it is recommended you configure the field setup for the following record types:

- Activity
- Appointment
- Broker Profile
- Claim
- Contact
- Contact Interests
- Coverage
- Financial Account
- Financial Plan
- Financial Products
- Financial Transactions
- Household
- Insurance Property
- Involved Party
- Lead
- Opportunity
- Policy
- Policy Holder
- Service Request

For more information about configuring the record types listed, see *Configuring Field Setup for Oracle CRM On Demand Financial Services Edition*.

## Activity Record Type

The Activity record type allows insurance professionals to capture additional information about activities such as call results and the type of call.

**CAUTION:** If you make a field required in the Activity Fields page, that field will be required for both the Task and Appointment record types. If you want to make a field required for Task but not Appointment, leave the field as not required in the Activity Fields page, and in step 2 of the Task Page Layout wizard, set the field as required. This ensures that the field is required for the Task record type, but not for the Appointment record type.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name  | Action                                                                                                                                                                           |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Call Result | Add picklist values: <ul style="list-style-type: none"> <li>• No Reach</li> <li>• Appointment</li> <li>• Stay in Touch</li> <li>• Dead File</li> <li>• Not Applicable</li> </ul> |
| Type        | Add picklist values: <ul style="list-style-type: none"> <li>• Birthday Call</li> <li>• Referral Call</li> <li>• Review Call</li> <li>• Lunch</li> </ul>                          |

## Appointment Record Type

The Appointment record type allows insurance professionals to capture additional information about appointments, such as new opportunities or the number of referrals.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name              | Action                        |
|-------------------------|-------------------------------|
| Appointment Rescheduled | Create a new check box field. |
| New Fact Finder         | Create a new check box field. |
| New Opportunity         | Create a new check box field. |
| Closing Interview       | Create a new check box field. |
| Number of Referrals     | Create a new Integer field.   |

## Broker Profile Record Type

The Broker Profile record type allows insurance professionals to capture demographic information about the broker such as broker name, address, phone numbers, fax number, Web site, description of business, and so on.

The following table shows the fields values that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name          | Action                                                                                                                                                                                                                                                                                                                                                                                  |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sub Channel         | Add picklist values: <ul style="list-style-type: none"><li>• Globals</li><li>• Locals</li><li>• Nationals</li><li>• Regionals</li><li>• Wholesalers</li></ul>                                                                                                                                                                                                                           |
| Segmentation        | Add picklist values: <ul style="list-style-type: none"><li>• Commercial</li><li>• Growth</li><li>• Retail</li></ul>                                                                                                                                                                                                                                                                     |
| Broker Profile Year | Add picklist values: <ul style="list-style-type: none"><li>• 2000</li><li>• 2001</li><li>• 2002</li><li>• 2003</li><li>• 2004</li><li>• 2005</li><li>• 2006</li><li>• 2007</li><li>• 2008</li><li>• 2009</li><li>• 2010</li><li>• 2011</li><li>• 2012</li><li>• 2013</li><li>• 2014</li><li>• 2015</li><li>• 2016</li><li>• 2017</li><li>• 2018</li><li>• 2019</li><li>• 2020</li></ul> |

## Contact Record Type

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name              | Action                                                                                                                                                                                                                                                                                                                                           |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Annual Revenue          | Create a new currency type field.                                                                                                                                                                                                                                                                                                                |
| Assets Under Management | Create a new currency type field.                                                                                                                                                                                                                                                                                                                |
| Best times to call      | Create a new multiselect picklist field with the following values: <ul style="list-style-type: none"> <li>• Early afternoon</li> <li>• Early morning</li> <li>• Evening</li> <li>• Later afternoon</li> <li>• Mid-morning</li> <li>• Noon</li> <li>• Saturday</li> <li>• Sunday</li> <li>• Weekend</li> </ul>                                    |
| Customer Since          | Create a new date type field.                                                                                                                                                                                                                                                                                                                    |
| Employer                | Create a new text (short) type field.                                                                                                                                                                                                                                                                                                            |
| Goal - Priority 1       | Create a new picklist field with the following values: <ul style="list-style-type: none"> <li>• Asset Preservation</li> <li>• New Home</li> <li>• Predictable Income</li> <li>• Retirement</li> <li>• Risk Management</li> <li>• Saving for College</li> <li>• Tax Sheltering</li> <li>• Vacation Home</li> <li>• Wealth Accumulation</li> </ul> |
| Goal - Priority 2       | Create a new picklist field with the following values: <ul style="list-style-type: none"> <li>• Asset Preservation</li> <li>• New Home</li> </ul>                                                                                                                                                                                                |

| Field Name        | Action                                                                                                                                                                                                                                                                                                                                |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <ul style="list-style-type: none"> <li>Predictable Income</li> <li>Retirement</li> <li>Risk Management</li> <li>Saving for College</li> <li>Tax Sheltering</li> <li>Vacation Home</li> <li>Wealth Accumulation</li> </ul>                                                                                                             |
| Goal - Priority 3 | <p>Create a new picklist field with the following values:</p> <ul style="list-style-type: none"> <li>Asset Preservation</li> <li>New Home</li> <li>Predictable Income</li> <li>Retirement</li> <li>Risk Management</li> <li>Saving for College</li> <li>Tax Sheltering</li> <li>Vacation Home</li> <li>Wealth Accumulation</li> </ul> |
| Goal - Priority 4 | <p>Create a new picklist field with the following values:</p> <ul style="list-style-type: none"> <li>Asset Preservation</li> <li>New Home</li> <li>Predictable Income</li> <li>Retirement</li> <li>Risk Management</li> <li>Saving for College</li> <li>Tax Sheltering</li> <li>Vacation Home</li> <li>Wealth Accumulation</li> </ul> |
| Goal - Priority 5 | <p>Create a new picklist field with the following values:</p> <ul style="list-style-type: none"> <li>Asset Preservation</li> <li>New Home</li> <li>Predictable Income</li> <li>Retirement</li> <li>Risk Management</li> <li>Saving for College</li> <li>Tax Sheltering</li> <li>Vacation Home</li> </ul>                              |

| Field Name           | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                      | <ul style="list-style-type: none"> <li>• Wealth Accumulation</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                 |
| Investable assets    | Create a new currency type field.                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Investment mix       | <p>Create a new multiselect picklist field with the following values:</p> <ul style="list-style-type: none"> <li>• Agencies</li> <li>• Alternatives</li> <li>• Bonds</li> <li>• Currencies</li> <li>• Equities</li> <li>• Futures</li> <li>• Hedge funds</li> <li>• Limited partnerships</li> <li>• Managed futures</li> <li>• Money markets</li> <li>• Mutual funds</li> <li>• Options</li> <li>• Structured products</li> <li>• Treasuries</li> </ul> |
| Potential Revenue    | Create a new currency type field.                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Total Life Insurance | Create a new currency type field.                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Status               | <p>Add the picklist values with:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Quiet Filed</li> <li>• Dead Filed</li> </ul>                                                                                                                                                                                                                                                                                                            |
| Account              | Rename to Business Account.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Call Frequency       | <p>Edit the picklist values as follows:</p> <ul style="list-style-type: none"> <li>• Annually</li> <li>• Bi-monthly</li> <li>• Monthly</li> <li>• Quarterly</li> <li>• Semi-annually</li> </ul>                                                                                                                                                                                                                                                         |
| Contact Type         | <p>Edit the picklist values as follows:</p> <ul style="list-style-type: none"> <li>• Center of Influence</li> </ul>                                                                                                                                                                                                                                                                                                                                     |

| Field Name         | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                    | <ul style="list-style-type: none"> <li>• Client</li> <li>• Customer</li> <li>• Colleague</li> <li>• Dead End</li> <li>• Friend</li> <li>• Lead</li> <li>• Prospect</li> </ul>                                                                                                                                                                                                                                                                                                     |
| Customer ID        | Rename to Contact ID.                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Experience Level   | <p>Rename to Investing Experience. Edit the picklist values as follows:</p> <ul style="list-style-type: none"> <li>• Expert</li> <li>• Limited</li> <li>• None</li> <li>• Professional</li> <li>• Proficient</li> </ul>                                                                                                                                                                                                                                                           |
| Investment Horizon | <p>Edit the picklist values as follows:</p> <ul style="list-style-type: none"> <li>• Less than 5 Years</li> <li>• 5 to 10 Years</li> <li>• 10 to 15 Years</li> <li>• 15 to 20 Years</li> <li>• More than 20 Years</li> </ul>                                                                                                                                                                                                                                                      |
| Lead Source        | <p>Rename to Source. Edit the picklist values as follows:</p> <ul style="list-style-type: none"> <li>• Advertisement</li> <li>• Direct Mail</li> <li>• Email</li> <li>• Event - Client Appreciation</li> <li>• Event - Other</li> <li>• Event - Seminar</li> <li>• Event - Trade Show</li> <li>• List - Purchased</li> <li>• List - Rented</li> <li>• Other</li> <li>• Referral - Client</li> <li>• Referral - External</li> <li>• Referral -Other</li> <li>• Web Site</li> </ul> |

| Field Name      | Action                                                                                                                                                                                     |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary Group   | Rename to Advisor Team.                                                                                                                                                                    |
| Risk Profile    | Rename to Risk Tolerance. Edit the picklist values as follows: <ul style="list-style-type: none"> <li>Aggressive</li> <li>Conservative</li> <li>Moderate</li> </ul>                        |
| Tier            | Rename to Book Segment. Edit the picklist values as follows: <ul style="list-style-type: none"> <li>Diamond</li> <li>Platinum</li> <li>Gold</li> <li>Silver</li> <li>Unassigned</li> </ul> |
| Total Net Worth | Rename to Net Worth.                                                                                                                                                                       |

## Contact Interests Record Type

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name | Action                                                                                                                                                                                                                                                                       |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Interests  | Rename to Category. Edit the picklist values as follows: <ul style="list-style-type: none"> <li>Culture</li> <li>Food and Wine</li> <li>Hobby</li> <li>Investments</li> <li>Physical Fitness</li> <li>Professional Sports</li> <li>Public Service</li> <li>Travel</li> </ul> |
| Category   | Rename to Interests. Edit the picklist values as follows: <ul style="list-style-type: none"> <li>Aerobics</li> <li>Alternative Investments</li> <li>Backpacking</li> </ul>                                                                                                   |

| Field Name | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|            | <ul style="list-style-type: none"> <li>• Ballet</li> <li>• Baseball</li> <li>• Basketball</li> <li>• Cabernet</li> <li>• Chardonnay</li> <li>• Charity Work</li> <li>• Church Board</li> <li>• Community Government</li> <li>• Domestic Travel</li> <li>• Equities</li> <li>• Film</li> <li>• Fine Art</li> <li>• Fixed Income</li> <li>• Food Bank Volunteer</li> <li>• Football</li> <li>• French Food</li> <li>• Gelato</li> <li>• Horseback Riding</li> <li>• Horse Racing</li> <li>• International Travel</li> <li>• Local Arts Board</li> <li>• Mexican Food</li> <li>• Model Airplanes</li> <li>• Modern Dance</li> <li>• Mutual Funds</li> <li>• NASCAR</li> <li>• Numismatics</li> <li>• Opera</li> <li>• Philately</li> <li>• Pinot Noir</li> <li>• Port</li> <li>• Private Equity</li> <li>• Real Estate</li> <li>• Running</li> <li>• Soccer</li> <li>• Structured Products</li> <li>• Symphony</li> <li>• Tennis</li> <li>• Theatre</li> </ul> |

| Field Name | Action                                                           |
|------------|------------------------------------------------------------------|
|            | <ul style="list-style-type: none"> <li>Weight Lifting</li> </ul> |

## Claim Record Type

The claim record types allow insurance professionals to view the claims created by contacts, households, and business accounts. Insurers can also use the claim record type to quickly record critical information regarding the first notice of loss and accurately route the claim to the appropriate personnel.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name        | Action                                                                                                                                   |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Ability to Work   | Add picklist values: <ul style="list-style-type: none"> <li>No</li> <li>Partial</li> <li>Yes</li> </ul>                                  |
| At Fault          | Add picklist values: <ul style="list-style-type: none"> <li>Insured Driver</li> <li>NA</li> <li>Other Driver</li> <li>Unknown</li> </ul> |
| Category of Loss  | Add picklist values: <ul style="list-style-type: none"> <li>Dwelling</li> <li>Other Structures</li> <li>Personal Property</li> </ul>     |
| Class of Employee | Add picklist values: <ul style="list-style-type: none"> <li>Clerical</li> <li>Management</li> <li>Supervisor</li> </ul>                  |
| Kind of Loss      | Add picklist values: <ul style="list-style-type: none"> <li>Fire</li> <li>Injury</li> <li>Theft</li> </ul>                               |
| Liability Source  | Add picklist values:                                                                                                                     |

| Field Name              | Action                                                                                                                                                        |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                         | <ul style="list-style-type: none"> <li>• Injured Employee</li> <li>• Property of Employee Damaged</li> <li>• Property of Private Person</li> </ul>            |
| Line of Business        | Add picklist values: <ul style="list-style-type: none"> <li>• Auto</li> <li>• General Liability</li> <li>• Life</li> <li>• Property</li> </ul>                |
| Location of Loss        | Add picklist values: <ul style="list-style-type: none"> <li>• Adverse Claimants Home Address</li> <li>• Business Address</li> <li>• Other Location</li> </ul> |
| Loss Code               | Add picklist values: <ul style="list-style-type: none"> <li>• 100</li> <li>• 101</li> <li>• 102</li> </ul>                                                    |
| Loss Type               | Add picklist values: <ul style="list-style-type: none"> <li>• Collision</li> <li>• Injury</li> </ul>                                                          |
| Medical Injury Code     | Add picklist values: <ul style="list-style-type: none"> <li>• IDC-9</li> <li>• IDC-10</li> </ul>                                                              |
| Part of Body Injured    | Add picklist values: <ul style="list-style-type: none"> <li>• Head Injury</li> <li>• Left Shoulder</li> <li>• Right Shoulder</li> </ul>                       |
| Place of Injury         | Add picklist values: <ul style="list-style-type: none"> <li>• Factory</li> <li>• Office</li> <li>• Warehouse</li> </ul>                                       |
| Relationship to Insured | Add picklist values:                                                                                                                                          |

| Field Name     | Action                                                                                                                                       |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------|
|                | <ul style="list-style-type: none"> <li>• Colleague</li> <li>• Employer</li> <li>• Supervisor</li> </ul>                                      |
| Reported By    | Add picklist values: <ul style="list-style-type: none"> <li>• Agent</li> <li>• Driver of Insured Vehicle</li> <li>• Named Insured</li> </ul> |
| State          | Add picklist values: <ul style="list-style-type: none"> <li>• AZ</li> <li>• CA</li> <li>• CO</li> </ul>                                      |
| Status         | Add picklist values: <ul style="list-style-type: none"> <li>• Loss Report</li> <li>• Open</li> <li>• Reviewed</li> </ul>                     |
| Type of Injury | Add picklist values: <ul style="list-style-type: none"> <li>• Burn</li> <li>• Fracture</li> <li>• Sprain</li> </ul>                          |

## Coverage Record Type

The coverage record type allows you to track what is covered under policies and what coverage is used in claims. It includes information such as type of coverage, individual limit, total limit, and deductible.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name | Action                                                                                                                                                          |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Coverage   | Add picklist values: <ul style="list-style-type: none"> <li>• Collision</li> <li>• Comprehensive</li> <li>• Bodily Injury</li> <li>• Medical Payment</li> </ul> |

| Field Name      | Action                                                                                                                                   |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Coverage Status | Add picklist values: <ul style="list-style-type: none"> <li>• Active</li> <li>• Closed</li> <li>• Inactive</li> <li>• Pending</li> </ul> |

## Financial Account Record Type

The Financial Account record type enables financial institutions to move from Financial Account centric relationships to Contact, Household and Business centric relationships. With the new ability to create, update, and track any type of Financial Accounts and to model all financial account structures, hierarchies and portfolios, Oracle CRM On Demand Financial Services Edition enables relationship centrality across Activities, Opportunities, Service Requests, and Calendar.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name | Action                                                                                                                                                                                |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type       | Add picklist values: <ul style="list-style-type: none"> <li>• Checking</li> <li>• Commercial</li> <li>• Investment</li> <li>• Mortgage</li> <li>• Savings</li> <li>• Trust</li> </ul> |

## Financial Account Holder Record Type

The Financial Account Holder record type allows financial institutions to create, manage, and leverage the complex relationships between financial accounts, contacts, households, and businesses. Within Financial Account Holders, you can model any and all relationships with specific roles, status, type, and dates. With household management and the new financial account holder solution, bankers and financial advisors can track all of their relationships in a contact, household, and business centric view.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name | Action                                                                                                                                                                                                                       |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role       | Add picklist values: <ul style="list-style-type: none"> <li>• External Advisor</li> <li>• Executive Assistance</li> <li>• Full Access</li> <li>• Guardian</li> <li>• Influencer</li> <li>• Legal</li> <li>• Owner</li> </ul> |

## Financial Plan Record Type

All Financial Plans must be assembled, managed and communicated throughout the plan's lifecycle. A very important part of that life is the interactions with the contacts, households, and businesses that are part of the financial plan. The financial plan record types allow relationship integration of the relationship so that financial advisors have access to financial plans for financial accounts, contacts, households, and businesses.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name | Action                                                                                                                                                                                                                                                            |
|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Status     | Add picklist values: <ul style="list-style-type: none"> <li>• Active - Signed</li> <li>• Approved by Manager</li> <li>• Draft in Process</li> <li>• Presented to Client</li> </ul>                                                                                |
| Type       | Add picklist values: <ul style="list-style-type: none"> <li>• Education</li> <li>• Family</li> <li>• Household</li> <li>• Portfolio</li> <li>• Retirements</li> <li>• Savings</li> <li>• Trust</li> <li>• Wealth Creation</li> <li>• Wealth Protection</li> </ul> |

## Financial Products Record Type

The financial product record type allows bankers and financial advisors to know what financial products a contact, household, or a business is interested in, holds, or is transacting. Oracle CRM On Demand Financial Services Edition allows financial services customers to track all financial product details and structures to understand the relationships related to the financial products.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

**Note:** It is recommended that you use the following Financial Product structure and hierarchy in descending order: Type, Category, Class, Sub-class, Financial Product A and then Child Financial Products A.1, A.2 and so on.

| Field Name | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Category   | <p>Add picklist values:</p> <ul style="list-style-type: none"><li>• Industry</li><li>• Segment</li><li>• Region</li></ul> <p><b>Note:</b> This field is used in a cascading picklist as the Child to the Type field. Add the values in a single list. When you later set up the cascading picklist, you will specify the relationship between the values in the Issue field and the values in the Type field.</p>                                                   |
| Class      | <p>Add picklist values:</p> <ul style="list-style-type: none"><li>• Government</li><li>• Technology</li><li>• North America</li><li>• EMEA</li><li>• APAC</li></ul> <p><b>Note:</b> This field is used in a cascading picklist as the Child to the Category field. Add the values in a single list. When you later set up the cascading picklist, you will specify the relationship between the values in the Issue field and the values in the Category field.</p> |

## Financial Transaction Record Type

The financial transaction record type allows bankers and financial advisors to view and track summary information about transactions.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name       | Action                                                                                                                                                                                                            |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Transaction Type | <p>Add picklist values:</p> <ul style="list-style-type: none"> <li>• Big Ticket</li> <li>• Buy</li> <li>• Failed</li> <li>• Out of Compliance</li> <li>• Pending</li> <li>• Redemption</li> <li>• Sell</li> </ul> |

## Household Record Type

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

**Note:** Displaying the Total Net Worth and Last Activity fields impacts performance since these fields are contingent on the number of contacts. If required, these fields can be removed.

| Field Name              | Action                                                                                                                                                                                                                                                                                                                    |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Annual Revenue          | Create a new currency type field.                                                                                                                                                                                                                                                                                         |
| Assets Under Management | Create a new currency type field.                                                                                                                                                                                                                                                                                         |
| Investable Assets       | Create a new currency type field.                                                                                                                                                                                                                                                                                         |
| Goal - Priority 1       | <p>Create a new picklist field, with the following values:</p> <ul style="list-style-type: none"> <li>• Asset Preservation</li> <li>• New Home</li> <li>• Predictable Income</li> <li>• Retirement</li> <li>• Risk Management</li> <li>• Saving for College</li> <li>• Tax Sheltering</li> <li>• Vacation Home</li> </ul> |

| Field Name        | Action                                                                                                                                                                                                                                                                                                                                                   |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <ul style="list-style-type: none"> <li>• Wealth Accumulation</li> </ul>                                                                                                                                                                                                                                                                                  |
| Goal - Priority 2 | <p>Create a new picklist field, with the following values:</p> <ul style="list-style-type: none"> <li>• Asset Preservation</li> <li>• New Home</li> <li>• Predictable Income</li> <li>• Retirement</li> <li>• Risk Management</li> <li>• Saving for College</li> <li>• Tax Sheltering</li> <li>• Vacation Home</li> <li>• Wealth Accumulation</li> </ul> |
| Goal - Priority 3 | <p>Create a new picklist field, with the following values:</p> <ul style="list-style-type: none"> <li>• Asset Preservation</li> <li>• New Home</li> <li>• Predictable Income</li> <li>• Retirement</li> <li>• Risk Management</li> <li>• Saving for College</li> <li>• Tax Sheltering</li> <li>• Vacation Home</li> <li>• Wealth Accumulation</li> </ul> |
| Goal - Priority 4 | <p>Create a new picklist field, with the following values:</p> <ul style="list-style-type: none"> <li>• Asset Preservation</li> <li>• New Home</li> <li>• Predictable Income</li> <li>• Retirement</li> <li>• Risk Management</li> <li>• Saving for College</li> <li>• Tax Sheltering</li> <li>• Vacation Home</li> <li>• Wealth Accumulation</li> </ul> |
| Potential Revenue | Create a new currency type field.                                                                                                                                                                                                                                                                                                                        |
| Risk Tolerance    | <p>Create a new picklist field, with the following values:</p> <ul style="list-style-type: none"> <li>• Conservative</li> </ul>                                                                                                                                                                                                                          |

| Field Name           | Action                                                                         |
|----------------------|--------------------------------------------------------------------------------|
|                      | <ul style="list-style-type: none"> <li>Moderate</li> <li>Aggressive</li> </ul> |
| Tax Bracket          | Create a new currency type field.                                              |
| Total Life Insurance | Create a new currency type field.                                              |
| Contact              | Rename to Address.                                                             |
| Primary Group        | Rename to Advisor Team.                                                        |
| Total Net Worth      | Rename to Net Worth.                                                           |
| Type                 | Rename to Household Type.                                                      |

## Insurance Property Record Type

The insurance property record type allows insurance professionals to track what properties are covered under certain Policies and also manage property information for all types of properties such as make, model, construction year, and license number.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name | Action                                                                                                                           |
|------------|----------------------------------------------------------------------------------------------------------------------------------|
| Type       | Add picklist values: <ul style="list-style-type: none"> <li>Motorcycle</li> <li>Motor Home</li> <li>Private Passenger</li> </ul> |

## Involved Party Record Type

The involved party record type allows insurance professionals to track the relationship between contacts and claims and capture the role of the contacts in the claim such as the claimant, the insured driver, or the lawyer.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name       | Action                                                                                                                                              |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| Location         | Add picklist values: <ul style="list-style-type: none"> <li>• In Involved Vehicle</li> <li>• In Uninvolved Vehicle</li> <li>• Pedestrian</li> </ul> |
| Role             | Add picklist values: <ul style="list-style-type: none"> <li>• Adverse Claimant</li> <li>• Claimant</li> <li>• Witness</li> </ul>                    |
| Role in accident | Add picklist values: <ul style="list-style-type: none"> <li>• Driver</li> <li>• Passenger</li> <li>• Pedestrian</li> </ul>                          |

## Lead Record Type

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name        | Action                                                                                                                                                                                                                                                                                                                    |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Investable Assets | Create a new currency type field.                                                                                                                                                                                                                                                                                         |
| Needs             | Create a new, multiselect picklist field, with the following values: <ul style="list-style-type: none"> <li>• Financial Planning</li> <li>• Retirement Planning</li> <li>• Education Planning</li> <li>• Life Insurance</li> <li>• Investment Management</li> <li>• Risk Management</li> <li>• Estate Planning</li> </ul> |
| Billing           | Rename to Address.                                                                                                                                                                                                                                                                                                        |
| Sales Person      | Rename to Financial Advisor.                                                                                                                                                                                                                                                                                              |
| Source            | Add the following value to the picklist:                                                                                                                                                                                                                                                                                  |

| Field Name | Action                                                                     |
|------------|----------------------------------------------------------------------------|
|            | <ul style="list-style-type: none"> <li>Referral</li> <li>Client</li> </ul> |

## Opportunity Record Type

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name           | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Potential Commission | Create a new currency field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Account              | <p>Edit the field as follows:</p> <ul style="list-style-type: none"> <li>Rename to Business Account.</li> <li>Deselect the Required check box in the Additional Information section of the Opportunity Field Edit page.</li> </ul> <p><b>Note:</b> You must also deselect the Required check box for the Account field on the opportunity page layout for each role in the Financial Services edition. For more information on setting up page layouts, see <a href="#">Setting Up Page Layouts for Oracle CRM On Demand Financial Services Edition</a>.</p> |
| Close Date           | Deselect the Required check box.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Opportunity Type     | <p>Edit the picklist values as follows:</p> <ul style="list-style-type: none"> <li>Product</li> <li>Service</li> </ul> <p><b>Note:</b> This field is used in a cascading picklist with the Product or Service field.</p>                                                                                                                                                                                                                                                                                                                                     |
| Reason Won/Lost      | <p>Edit the picklist values as follows:</p> <ul style="list-style-type: none"> <li>Control Issues</li> <li>Hired Personal Referral</li> <li>Fees too High</li> <li>Lack of Experience</li> <li>Did Not Perceive Value</li> <li>Do-It-Yourselfer</li> <li>Lost to Competition</li> <li>Lost to No Decision</li> <li>Other</li> </ul>                                                                                                                                                                                                                          |

| Field Name | Action                                                                                                                                |
|------------|---------------------------------------------------------------------------------------------------------------------------------------|
|            | <ul style="list-style-type: none"> <li>Relationship</li> <li>Track Record</li> <li>Referral</li> <li>Existing Relationship</li> </ul> |
| Revenue    | Rename to Potential Revenue.                                                                                                          |

## Policy Record Type

The Policy record type allows you to track and view all types of insurance policies that are integrated to your policy systems. The policy record type enables insurance professionals to view policy portfolios held by contacts, households, and business accounts.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name        | Action                                                                                                                   |
|-------------------|--------------------------------------------------------------------------------------------------------------------------|
| Policy # Policy # | Rename to Policy Number.                                                                                                 |
| Billing Status    | Add picklist values: <ul style="list-style-type: none"> <li>Billed</li> <li>Lapse</li> <li>Paid</li> </ul>               |
| Policy Pay Method | Add picklist values: <ul style="list-style-type: none"> <li>Cash</li> <li>Charged</li> <li>Check</li> </ul>              |
| Policy Type       | Add picklist values: <ul style="list-style-type: none"> <li>Auto</li> <li>General Liability</li> <li>Property</li> </ul> |
| Rate Plan         | Add picklist values: <ul style="list-style-type: none"> <li>01</li> <li>02</li> </ul>                                    |
| Rate State        | Add picklist values:                                                                                                     |

| Field Name      | Action                                                                                                                         |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>AZ</li> <li>CA</li> <li>CO</li> </ul>                                                   |
| Referral Source | Add picklist values: <ul style="list-style-type: none"> <li>Internet</li> <li>Direct Mail</li> <li>Magazine Ad</li> </ul>      |
| Status          | Add picklist values: <ul style="list-style-type: none"> <li>In Force</li> <li>New Business</li> <li>Pending</li> </ul>         |
| Sub-Status      | Add picklist values: <ul style="list-style-type: none"> <li>Broker Review</li> <li>Cancelled</li> <li>Not Submitted</li> </ul> |

## Policy Holder Record Type

The policy holders record type allows insurance professionals to manage all roles, relationship types, and the history of a policy holder including the insured, driver, and beneficiary, across the client, household, and business relationships.

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name | Action                                                                                                                                                                                                                                 |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role       | Add picklist values: <ul style="list-style-type: none"> <li>Beneficiary</li> <li>Driver</li> <li>Executive Assistance</li> <li>External Advisor</li> <li>Full Access</li> <li>Guardian</li> <li>Influencer</li> <li>Insured</li> </ul> |

| Field Name | Action                                                                 |
|------------|------------------------------------------------------------------------|
|            | <ul style="list-style-type: none"> <li>Legal</li> <li>Owner</li> </ul> |

## Service Request Record Type

The following table shows the fields that you might want to set up in the Oracle CRM On Demand Financial Services Edition for this record type.

| Field Name               | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Area                     | <p>Create a new picklist field with the following values:</p> <ul style="list-style-type: none"> <li>Claim</li> <li>Distributions</li> <li>Financial Account Services</li> <li>Financial Products</li> <li>Financial Plan</li> <li>Forms</li> <li>Holdings</li> <li>Households</li> <li>Online Access</li> <li>Policy</li> <li>Profile</li> <li>Transactions</li> <li>Other</li> </ul> <p><b>Note:</b> This field is used in a cascading picklist with the Type field (renamed Issue).</p> |
| Preferred Contact Method | <p>Create a new picklist field with the following values:</p> <ul style="list-style-type: none"> <li>Home Phone</li> <li>Work Phone</li> <li>Cell Phone</li> <li>Email</li> </ul>                                                                                                                                                                                                                                                                                                          |
| Account                  | Rename to Business Account.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Type                     | <p>Rename to Issue. Edit the picklist values as follows:</p> <ul style="list-style-type: none"> <li>Financial Account options: <ul style="list-style-type: none"> <li>Checking</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                      |

| Field Name | Action                                                                                                                                                                                                                                                                                                |
|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|            | <ul style="list-style-type: none"> <li>Commercial</li> <li>Investment</li> <li>Mortgage</li> <li>Savings</li> <li>Trust</li> </ul>                                                                                                                                                                    |
| Type       | <ul style="list-style-type: none"> <li>Household option: <ul style="list-style-type: none"> <li>Household Type</li> </ul> </li> </ul>                                                                                                                                                                 |
| Type       | <ul style="list-style-type: none"> <li>Financial Account Holdings options: <ul style="list-style-type: none"> <li>External Advisor</li> <li>Executive Assistance</li> <li>Full Access</li> <li>Guardian</li> <li>Influencer</li> <li>Legal</li> <li>Owner</li> </ul> </li> </ul>                      |
| Type       | <ul style="list-style-type: none"> <li>Financial Product options: <ul style="list-style-type: none"> <li>Bond</li> <li>Equity</li> <li>Mutual Fund</li> <li>Debt</li> </ul> </li> </ul>                                                                                                               |
| Type       | <ul style="list-style-type: none"> <li>Financial Plan options: <ul style="list-style-type: none"> <li>Education</li> <li>Family</li> <li>Household</li> <li>Portfolio</li> <li>Retirements</li> <li>Savings</li> <li>Trust</li> <li>Wealth Creation</li> <li>Wealth Protection</li> </ul> </li> </ul> |
| Type       | <ul style="list-style-type: none"> <li>Financial Transaction options:</li> </ul>                                                                                                                                                                                                                      |

| Field Name | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|            | <ul style="list-style-type: none"> <li>○ Big Ticket</li> <li>○ Buy</li> <li>○ Failed</li> <li>○ Out of Compliance</li> <li>○ Pending</li> <li>○ Redemption</li> <li>○ Sell</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Type       | <ul style="list-style-type: none"> <li>▪ Policy options: <ul style="list-style-type: none"> <li>○ Auto</li> <li>○ General Liability</li> <li>○ Property</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Type       | <ul style="list-style-type: none"> <li>▪ Claim options: <ul style="list-style-type: none"> <li>○ Auto</li> <li>○ General Liability</li> <li>○ Life</li> <li>○ Property</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Type       | <ul style="list-style-type: none"> <li>▪ Forms options: <ul style="list-style-type: none"> <li>○ IRA Distribution</li> <li>○ IRA Beneficiary Designation Accounts options:</li> <li>○ Name Change</li> <li>○ Address Change</li> <li>○ Phone Number Change</li> <li>○ Enable Margin</li> <li>○ Enable Options Trading Profile options:</li> <li>○ Risk Profile Change</li> <li>○ Financial Situation Change</li> <li>○ Marital Status Change</li> <li>○ Objectives Change</li> </ul> </li> <li>▪ Online Access options: <ul style="list-style-type: none"> <li>○ Forgot Username/Password</li> <li>○ Enable Online Trading</li> </ul> </li> <li>▪ Distribution options:</li> </ul> |

For more information about example configuration picklists, see [Example Configuration Picklists](#).

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Application Customization view.
2. In the Record Type Setup section, click the link for the required record type, for example, Contact.
3. In the Cascading Picklists section, click the required Cascading Picklists link, for example, Contact Interests Cascading Picklists.
4. In the Cascading Picklists page, do one of the following:
  - o Click Edit or Copy to modify an existing cascading picklist definition.
  - o Click New to create a new cascading picklist definition.

5. Select the parent picklist field and the related picklist field.

**Note:** In a cascading picklist, the value that the user selects in the parent field determines which value the user can see in the list in the related field.

6. In the wizard, go to step 2 (Select Values), and specify the values that are to be displayed in the list on the related field when the user selects a value in the parent field.
7. Click a value in the parent field, and use the directional arrows to move the corresponding values for the related field from the Related Picklists Available Values list to the Related Picklist Displayed Values list.
8. In the wizard, go to Step 3, review your field configuration, and then click Finish to complete the setup.

## Example Configuration Picklists

You can use the following tables as example configurations for cascading picklists:

- Contact Interest
- Service Request
- Financial Products
- Activity Type

### Contact Interests

The following table shows an example configuration for cascading picklists for Contact Interests in Oracle CRM On Demand.

| Parent Picklist Value | Related Picklist Value                                                                                                                                                                    |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Interest</b>       | <b>Category</b>                                                                                                                                                                           |
| Culture               | <ul style="list-style-type: none"> <li>• Ballet</li> <li>• Film</li> <li>• Fine Art</li> <li>• Modern Dance</li> <li>• Opera</li> <li>• Symphony</li> <li>• Theatre</li> </ul>            |
| Food and Wine         | <ul style="list-style-type: none"> <li>• Cabernet</li> <li>• Chardonnay</li> <li>• French Food</li> <li>• Gelato</li> <li>• Mexican Food</li> <li>• Pinot Noir</li> <li>• Port</li> </ul> |
| Hobby                 | <ul style="list-style-type: none"> <li>• Backpacking</li> <li>• Horseback Riding</li> <li>• Model Airplanes</li> <li>• Numismatics</li> <li>• Philately</li> </ul>                        |
| Investments           | <ul style="list-style-type: none"> <li>• Alternative Investments</li> </ul>                                                                                                               |

| Parent Picklist Value | Related Picklist Value                                                                                                                                                                       |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                       | <ul style="list-style-type: none"> <li>• Equities</li> <li>• Fixed Income</li> <li>• Mutual Funds</li> <li>• Private Equity</li> <li>• Real Estate</li> <li>• Structured Products</li> </ul> |
| Physical Fitness      | <ul style="list-style-type: none"> <li>• Aerobics</li> <li>• Backpacking</li> <li>• Horseback Riding</li> <li>• Running</li> <li>• Tennis</li> <li>• Weight Lifting</li> </ul>               |
| Professional Sports   | <ul style="list-style-type: none"> <li>• Baseball</li> <li>• Basketball</li> <li>• Football</li> <li>• Horse Racing</li> <li>• NASCAR</li> <li>• Soccer</li> </ul>                           |
| Public Service        | <ul style="list-style-type: none"> <li>• Charity Work</li> <li>• Church Board</li> <li>• Community Government</li> <li>• Food Bank Volunteer</li> <li>• Local Arts Board</li> </ul>          |
| Travel                | <ul style="list-style-type: none"> <li>• Backpacking</li> <li>• Domestic Travel</li> <li>• International Travel</li> </ul>                                                                   |
| Other                 | Other                                                                                                                                                                                        |

## Service Requests

The following table shows an example configuration for cascading picklists for Service Requests in Oracle CRM On Demand.

| Parent Picklist Value      | Related Picklist Value                                                                                                                                                    |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Area                       | Type                                                                                                                                                                      |
| Forms                      | <ul style="list-style-type: none"> <li>IRA Distribution</li> <li>IRA Beneficiary Designation</li> </ul>                                                                   |
| Financial Account Services | <ul style="list-style-type: none"> <li>Name Change</li> <li>Address Change</li> <li>Phone Number Change</li> <li>Enable Margin</li> <li>Enable Options Trading</li> </ul> |
| Profile                    | <ul style="list-style-type: none"> <li>Risk Profile Change</li> <li>Financial Situation Change</li> <li>Marital Status Change</li> <li>Objectives Change</li> </ul>       |
| Online Access              | <ul style="list-style-type: none"> <li>Forgot Username/Password</li> <li>Enable Online Trading</li> </ul>                                                                 |
| Distributions              | <ul style="list-style-type: none"> <li>IRA Distribution</li> <li>Send Check</li> </ul>                                                                                    |
| Other                      | Other                                                                                                                                                                     |

## Financial Products

The following table shows an example configuration for cascading picklists for Financial Products in Oracle CRM On Demand.

| Parent Picklist Value | Related Picklist Value                                                                                                              |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Area                  | Type                                                                                                                                |
| Industry              | <ul style="list-style-type: none"> <li>Government</li> <li>Technology</li> <li>North America</li> <li>EMEA</li> <li>APAC</li> </ul> |
| Technology            | <ul style="list-style-type: none"> <li>Hardware</li> </ul>                                                                          |

| Parent Picklist Value | Related Picklist Value                                                                                    |
|-----------------------|-----------------------------------------------------------------------------------------------------------|
|                       | <ul style="list-style-type: none"> <li>Software</li> </ul>                                                |
| Referral Call         | <ul style="list-style-type: none"> <li>Bond</li> <li>Equity</li> <li>Mutual Fund</li> <li>Debt</li> </ul> |

## Activity Type

The following table shows an example configuration for cascading picklists for Activity Type and its corresponding Call Result in Oracle CRM On Demand.

| Parent Picklist Value | Related Picklist Value                                                                                                    |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Area</b>           | <b>Type</b>                                                                                                               |
| Birthday Call         | <ul style="list-style-type: none"> <li>No Reach</li> <li>Appointment</li> <li>Stay in Touch</li> <li>Dead File</li> </ul> |
| Review Call           | <ul style="list-style-type: none"> <li>No Reach</li> <li>Appointment</li> <li>Stay in Touch</li> <li>Dead File</li> </ul> |
| Referral Call         | <ul style="list-style-type: none"> <li>No Reach</li> <li>Appointment</li> <li>Stay in Touch</li> <li>Dead File</li> </ul> |

## Setting Up Page Layouts for Oracle CRM On Demand Financial Services Edition

It is recommended that you set up page layouts for each role that you intend to create in Oracle CRM On Demand Financial Services Edition.

**Note:** The page layouts described in this guide are the layouts for the Detail and Edit pages where users view and edit existing records of the relevant record types. You can optionally create separate layouts for the pages where users enter information for new records, and then assign those layouts to your user roles. For information about creating layouts for new record pages, see *Oracle CRM On Demand Online Help*.

When setting up a page layout, you can create a new layout, or you can copy or edit an existing layout. You can add fields to the page layout as well as to the sections within the page, and you can also expose the related information in the page layout.

In Oracle CRM On Demand Financial Services Edition, there are 14 record types that have preconfigured fields for common industry use. The following record types have many of the page layouts created for you:

- Broker Profile
- Claim
- Coverage
- Damage
- Financial Account
- Financial Account Holder
- Financial Account Holdings
- Financial Plan
- Financial Product
- Financial Transaction
- Insurance Property
- Involved Party
- Policy
- Policy Holder

Company administrators typically set up the page layouts for the following record types for each role in Oracle CRM On Demand Financial Services Edition:

- Activity
- Appointment
- Campaign
- Contact
- Household
- Lead
- Opportunity
- Service Request

The tables in this procedure show the details of the page layouts and related information sections that company administrators typically set up for Oracle CRM On Demand Financial Services Edition.

This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

## To set up a page layout for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Application Customization view.
2. In the Record Type Setup section, click the link for the required record type, for example, Contact.
3. In the Page Layout Management section, click the link for the required page layout type, for example, Contact Page Layout.
4. If you want to create a copy of an existing layout, or to create a new layout, perform the following steps:
  - a. On the record type Page Layout page, click the Copy link next to a layout to create a new layout that is based on an existing layout, or click New Layout on the title bar to create an entirely new layout.  
The Page Layout wizard opens.
  - b. In Step 1 of the wizard, enter a name for the layout and (optionally) a description.
  - c. Click Finish to save the layout.

**Note:** You will return later to the Page Layout wizard to finish setting up the page layout.

5. On the record type Page Layout page, click the Edit Sections link for the layout that you want to configure.  
The Section Names Setup page opens.
6. Enter the labels for any new sections that you want to set up on the page layout.

The following table shows the sections that company administrators typically set up for page layouts for each role in Oracle CRM On Demand Financial Services Edition.

| Page Layout | Existing Section Name      | Rename To                    |
|-------------|----------------------------|------------------------------|
| Contact     | Contact Detail Information | Personal Profile             |
|             | Additional Information     | Financial Profile            |
|             | Available Section          | Investment Profile           |
|             | Available Section          | Additional Information       |
| Household   | Available Section          | Household Financial Profile  |
|             | Available Section          | Household Investment Profile |
|             | Available Section          | Additional Information       |
| Appointment | Available Section          | Appointment Result           |

7. Click Save.
8. On the record type Page Layout page, click the Edit link next to the layout that you want to configure.

The Page Layout wizard opens.

9. In the wizard, go to Step 2 (Field Setup), and specify the field setup for the page layout. For each available field, select either the Required or Read-Only check box, as necessary to support your business processes.

**Note:** You must deselect the Required check box for the Business Account field (that is, the renamed Account field) and the Close Date field on the opportunity page layout for each role in Oracle CRM On Demand Financial Services Edition.

See the table in Step 10 of this procedure for details about the fields in the suggested page layouts and sections for Oracle CRM On Demand Financial Services Edition.

10. In the wizard, go to Step 3 (Field Layout), and configure the field layout for the page.

The following table shows the page layouts that are typically configured for each role in the Financial Service edition. Use the directional arrows to add fields to the various page sections, and remove any fields that are not needed, by moving them from the page sections to the Available Fields list.

| Record Type | Field on Left Side of Page         | Field on Right Side of Page        |
|-------------|------------------------------------|------------------------------------|
| Appointment | <b>Key Appointment Information</b> | <b>Key Appointment Information</b> |
|             | Subject                            | Start Time                         |
|             | Type                               | End Time                           |
|             | Location                           | Private                            |
|             | <b>Related Items</b>               | <b>Related Items</b>               |
|             | Primary Contact                    | Campaign                           |
|             | Opportunity                        | Account                            |
|             | <b>Appointment Result</b>          | <b>Appointment Result</b>          |
|             | Appointment Rescheduled            | New Opportunity                    |
|             | New Fact Finder                    | Closing Interview                  |
|             | Number of Referral                 | Not applicable                     |

| Record Type     | Field on Left Side of Page      | Field on Right Side of Page     |
|-----------------|---------------------------------|---------------------------------|
|                 | <b>Additional Information</b>   | <b>Additional Information</b>   |
|                 | Created By                      | Delegated By                    |
| <b>Activity</b> | <b>Key Call Information</b>     | <b>Key Call Information</b>     |
|                 | Subject                         | Lead Name                       |
|                 | Type                            | Contact Name                    |
|                 | Status                          | Priority                        |
|                 | Call Result                     | Due Date                        |
|                 | Description                     | Not applicable                  |
|                 | <b>Related Items</b>            | <b>Related Items</b>            |
|                 | Primary Contact                 | Campaign                        |
|                 | Opportunity                     | Account                         |
|                 | <b>Additional Information</b>   | <b>Additional Information</b>   |
|                 | Created By                      | Delegated By                    |
|                 |                                 |                                 |
| <b>Campaign</b> | <b>Key Campaign Information</b> | <b>Key Campaign Information</b> |
|                 | Campaign Name                   | Start Date                      |
|                 | Campaign Type                   | End Date                        |
|                 | Objective                       | Campaign Currency               |
|                 | Source Code                     | End Day                         |

| Record Type    | Field on Left Side of Page       | Field on Right Side of Page      |
|----------------|----------------------------------|----------------------------------|
|                |                                  |                                  |
|                | Audience                         | Not applicable                   |
|                | Offer                            | Not applicable                   |
|                | <b>Campaign Plan Information</b> | <b>Campaign Plan Information</b> |
|                | Revenue Target                   | Actual Cost                      |
|                | # Targeted                       | Not applicable                   |
|                | <b>Additional Information</b>    | <b>Additional Information</b>    |
|                | Owner                            | Modified By                      |
|                | Created By                       | General Notes                    |
| <b>Contact</b> | <b>Key Contact Information</b>   | <b>Key Contact Information</b>   |
|                | Mr./Mrs.                         | Work Phone #                     |
|                | First Name                       | Cellular Phone #                 |
|                | Middle Name                      | Home Phone #                     |
|                | Last Name                        | Email                            |
|                | Business Account                 | Employer                         |
|                | Contact Type                     | Self-Employed                    |
|                | Book Segment                     | Job Title                        |
|                | Contact ID                       | Profession                       |

| Record Type | Field on Left Side of Page | Field on Right Side of Page |
|-------------|----------------------------|-----------------------------|
|             | Status                     | Qualified Date              |
|             | Date                       | Not applicable              |
|             | <b>Personal Profile</b>    | <b>Personal Profile</b>     |
|             | Goals                      | Last Call Date              |
|             | Client Since Date          | Call Frequency              |
|             | Demographic                | Next Call Date              |
|             | Date of Birth              | Best Times to Call          |
|             | Age                        | Referred By                 |
|             | Gender                     | Source                      |
|             | Marital Status             | Last Activity Date          |
|             | <b>Financial Profile</b>   | <b>Financial Profile</b>    |
|             | Assets Under Management    | Total Assets                |
|             | Investable Assets          | Total Liabilities           |
|             | Total Income               | Net Worth                   |
|             | Total Expenses             | Total Life Insurance        |
|             | Annual Revenue             | Credit Score                |
|             | Potential Revenue          | Tax Bracket                 |
|             | Not applicable             | Contact Currency            |

| Record Type      | Field on Left Side of Page         | Field on Right Side of Page        |
|------------------|------------------------------------|------------------------------------|
|                  |                                    |                                    |
|                  | <b>Investment Profile</b>          | <b>Investment Profile</b>          |
|                  | Risk Tolerance                     | Goal-Priority 1                    |
|                  | Investing Experience               | Goal-Priority 2                    |
|                  | Investment Horizon                 | Goal-Priority 3                    |
|                  | Investment Mix                     | Goal-Priority 4                    |
|                  | <b>Additional Information</b>      | <b>Additional Information</b>      |
|                  | Advisor Team                       | Modified By                        |
|                  | General Notes                      | Not applicable                     |
|                  | Owner                              | Created                            |
| <b>Household</b> | <b>Key Household Information</b>   | <b>Key Household Information</b>   |
|                  | Household Name                     | Primary Contact                    |
|                  | Household Type                     | Primary Contact Phone              |
|                  | Segment                            | Risk Tolerance                     |
|                  | Assets Under Management            | Investment Horizon                 |
|                  | Net Worth                          | Not applicable                     |
|                  | <b>Household Financial Profile</b> | <b>Household Financial Profile</b> |
|                  | Assets Under Management            | Total Assets                       |

| Record Type | Field on Left Side of Page          | Field on Right Side of Page         |
|-------------|-------------------------------------|-------------------------------------|
|             | Investable Assets                   | Total Liabilities                   |
|             | Total Income                        | Net Worth                           |
|             | Total Expenses                      | Total Life Insurance                |
|             | Annual Revenue                      | Tax Bracket                         |
|             | Potential Revenue                   | Household Currency                  |
|             | <b>Household Investment Profile</b> | <b>Household Investment Profile</b> |
|             | Goal-Priority 1                     | Goal-Priority 3                     |
|             | Goal-Priority 2                     | Goal-Priority 4                     |
|             | <b>Additional Information</b>       | <b>Additional Information</b>       |
|             | Advisor Team                        | Modified By                         |
|             | Owner                               | Last Activity Date                  |
|             | General Notes                       | Not applicable                      |
|             |                                     |                                     |
| Lead        | <b>Key Lead Information</b>         | <b>Key Lead Information</b>         |
|             | Mr./Ms.                             | Job Title                           |
|             | First Name                          | Profession                          |
|             | Last Name                           | Work Phone #                        |
|             | Address                             | Cellular Phone #                    |
|             | Email                               | Home Phone #                        |
|             |                                     |                                     |

| Record Type        | Field on Left Side of Page             | Field on Right Side of Page            |
|--------------------|----------------------------------------|----------------------------------------|
|                    |                                        |                                        |
|                    | Referred By                            | Approximate Income                     |
|                    | Profession                             | Age                                    |
|                    | Date of Birth                          | Not applicable                         |
|                    | <b>Opportunity Related Information</b> | <b>Opportunity Related Information</b> |
|                    | Status                                 | Source                                 |
|                    | Rating                                 | Campaign                               |
|                    | Needs                                  | Investable Assets                      |
|                    | Estimated Close Date                   | Potential Revenue                      |
|                    | <b>Additional Information</b>          | <b>Additional Information</b>          |
|                    | Financial Advisor                      | Reassign Owner                         |
|                    | Created                                | Owner                                  |
|                    | Modified                               | Not applicable                         |
|                    | General Notes                          | Not applicable                         |
| <b>Opportunity</b> | <b>Key Opportunity Information</b>     | <b>Key Opportunity Information</b>     |
|                    | Opportunity Name                       | Potential Revenue                      |
|                    | Primary Contact Last Name              | Potential Commission                   |
|                    | Business Account                       | Close Date                             |

| Record Type     | Field on Left Side of Page        | Field on Right Side of Page       |
|-----------------|-----------------------------------|-----------------------------------|
|                 | Sales Stage                       | Not applicable                    |
|                 | Opportunity Type                  | Not applicable                    |
|                 | Product or Service                | Not applicable                    |
|                 | <b>Sales Detail Information</b>   | <b>Sales Detail Information</b>   |
|                 | Status                            | Probability                       |
|                 | Priority                          | Reason Won/Lost                   |
|                 | <b>Additional Information</b>     | <b>Additional Information</b>     |
|                 | Owner                             | Modified By                       |
|                 | General Notes                     | Not applicable                    |
| Service Request | <b>Contact Information</b>        | <b>Contact Information</b>        |
|                 | SR Number                         | Work Phone #                      |
|                 | Contact                           | Cell Phone #                      |
|                 | Business Account                  | Home Phone #                      |
|                 | Preferred Contact Method          | Email                             |
|                 | <b>Service Detail Information</b> | <b>Service Detail Information</b> |
|                 | Area                              | Priority                          |
|                 | Issue                             | Status                            |
|                 | Source                            | Opened Time                       |

| Record Type | Field on Left Side of Page    | Field on Right Side of Page   |
|-------------|-------------------------------|-------------------------------|
|             |                               |                               |
|             | Modified By                   | Closed Time                   |
|             | Created By                    | Owner                         |
|             | SR Currency                   | Reassign Owner                |
|             | <b>Additional Information</b> | <b>Additional Information</b> |
|             | Subject                       | Not applicable                |
|             | Description                   | Not applicable                |

11. In the wizard, go to Step 4 (Related Information), and move the Related Information items to the Displayed Information or Available Information sections, as required.

The following table lists the related information sections that company administrators typically expose (that is, move to the Displayed Information section) in the page layouts for each role in Oracle CRM On Demand Financial Services Edition.

| Page Layout     | Related Information  |
|-----------------|----------------------|
| <b>Campaign</b> | Open Activities      |
|                 | Completed Activities |
|                 | Leads                |
|                 | Financial Accounts   |
|                 | Financial Plans      |
|                 | Policies             |
|                 | Notes                |
|                 | Attachments          |

| Page Layout | Related Information       |
|-------------|---------------------------|
| Contacts    | Recipients                |
|             | Households                |
|             | Contact Interests         |
|             | Contact Relationships     |
|             | Financial Account Holders |
|             | Policy Holders            |
|             | Contact Team              |
|             | Opportunities             |
|             | Referrals                 |
|             | Notes                     |
|             | Service Requests          |
|             | Campaigns                 |
|             | Attachments               |
|             | Open Activities           |
|             | Completed Activities      |
|             | Addresses                 |
|             | Claims                    |

| Page Layout | Related Information        |
|-------------|----------------------------|
|             | Policies                   |
| Household   | Contacts                   |
|             | Opportunities              |
|             | Notes                      |
|             | Leads                      |
|             | Service Requests           |
|             | Household Team             |
|             | Attachments                |
|             | Open Activities            |
|             | Completed Activities       |
|             | Portfolios                 |
| Lead        | Lead Qualification Scripts |
|             | Open Activities            |
|             | Completed Activities       |
|             | Attachments                |
| Opportunity | Contacts                   |
|             | Product Revenues           |
|             | Notes                      |

| Page Layout | Related Information     |
|-------------|-------------------------|
|             |                         |
|             | Open Activities         |
|             | Completed Activities    |
|             | Opportunity Partners    |
|             | Opportunity Competitors |
|             | Leads                   |
|             | Attachments             |
| Policy      | Attachments             |
|             | Books                   |
|             | Custom Objects          |
|             | Open Activities         |
|             | Completed Activities    |
|             | Policy Holders          |
|             | Coverages               |
|             | Insurance Properties    |
|             | Claims                  |
| Claims      | Involved Parties        |
|             | Damages                 |

| Page Layout     | Related Information                                                                                                               |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------|
|                 | Open Activities                                                                                                                   |
|                 | Completed Activities                                                                                                              |
| Portfolios      | Portfolios                                                                                                                        |
|                 | Contacts                                                                                                                          |
|                 | Open Activities                                                                                                                   |
|                 | Completed Activities                                                                                                              |
|                 | Portfolio Team                                                                                                                    |
| Service Request | Open Activities                                                                                                                   |
|                 | Completed Activities                                                                                                              |
|                 | Notes                                                                                                                             |
|                 | Audit Trail                                                                                                                       |
|                 | Attachments                                                                                                                       |
| Activity        | Outlook Calendar. For an example, see <a href="#">Adding an Outlook Web Applet to a Task Detail Page as Related Information</a> . |
| Partner         | Partner Relationship                                                                                                              |
|                 | Addresses                                                                                                                         |
|                 | Application                                                                                                                       |
|                 | Lead                                                                                                                              |
|                 | MDF Request                                                                                                                       |

| Page Layout | Related Information        |
|-------------|----------------------------|
|             |                            |
|             | Broker Profile             |
|             | Notes                      |
|             | Books                      |
|             | Partner Organization Books |
|             | Business Plans             |
|             | Campaigns                  |

12. Click Finish.

## Adding an Outlook Web Applet to a Task Detail Page as Related Information

You can embed external Web content, such as Microsoft Outlook, by creating a custom Web applet that appears as a related information section in your task detail page.

To perform this procedure, your role must include the Customize Application and Manage Custom Web Applets privileges.

To add a Microsoft Outlook Web applet to a task detail page as related information

1. In the upper-right corner of any page, click the Admin global link.
2. Click Application Customization.
3. Click Activity.
4. In the Application Setup section, click Global Web Applets, then click New.
5. In the Custom Web Applet page, complete the following fields, and click Save.

| Field    | Comments                |
|----------|-------------------------|
| Name     | Enter Outlook Calendar. |
| Location | Select Detail Page.     |

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type            | Select HTML.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Web Applet HTML | <p>Add the following code:</p> <pre>&lt;script src="http://www.gmodules.com/ig/ifr?url=http:// hosting.gmodules. com/ig/gadgets/file/118137453981720645697/MSOutlookWidget.xml &amp;up_ DefaultView=Inbox&amp;synd=open&amp;w=800&amp;h=500&amp;title= Microsoft+Outlook&amp;border=http%3A%2F%2Fwww.gmodules.com%2Fg %2Fimages%2F&amp;output=js"&gt;&lt;/script&gt;</pre> <p><b>Note:</b> To change the size of the Microsoft Outlook gadget, modify the numbers (in pixels) for the width, which is 800 (w=800) in the code shown here, and the height, which is 500 (h=500) in the code shown here.</p> |

## Making the Web Applet Visible

Complete the following procedure to make the Microsoft Outlook Web applet visible.

### To make the Web applet visible

1. In the upper-right corner of any page, click the Admin global link.
2. Click Application Customization, then click Activity.
3. In the Application Setup section, click My Homepage Layout.
4. In the Page Layout Management section, click Task Page Layout.
5. In the Task Page Layout list, click Edit to modify your existing layout.

The Page Layout Wizard is displayed and guides you through the process.

6. In Step 4 Related Information:
  - a. Move the new Outlook Calendar 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.

## Displaying the Calendar

Complete the procedure to display the calendar.

### To display the calendar

1. Open Microsoft Outlook and navigate to the calendar.

2. To display the weekly calendar, select the Weekly tab in Microsoft Outlook first before it displays in the Microsoft Outlook Calendar Web applet.

If you want to display the Calendar, open Outlook and navigate to the Calendar. If you want to display the weekly Calendar, select the weekly tab in your Outlook first before it displays in the Outlook Calendar web applet.

## Modifying Search Layouts for Oracle CRM On Demand Financial Services Edition

Complete the steps in the following procedure to modify the search layout for the record types.

Company administrators typically modify the search layout for the Insurance Property record type for each role in the Financial Services edition.

This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

### To modify a search layout for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Application Customization view.
2. In the Record Type Setup section, click the link for the Insurance Property record type.
3. In the Search Layout Management section, click the Insurance Property Search Layout.
4. In Insurance Property Search Layout page, click the Copy link next to a layout to create a new layout that is based on an existing layout, or click New Layout on the title bar to create an entirely new layout.  
The Page Layout wizard opens.
5. In Step 1 of the wizard, enter a name for the layout and (optionally) a description and click Next.
6. In Step 2 Specify Targeted Search Field, select fields from the available Fields list and use the up and down arrows next to the Selected Fields list to organize the search fields in the order you want, or you can leave the default field in this step.
7. In Step 4 Define Search Results Layout, select fields from the available Fields list and put the fields in the Lookup Window and Search Results Fields section. For example to help search the Insurance property, the administrator can select: Policy, Type, Make, Model, Amount fields to be put in the Lookup Window and Search Results Fields section.
8. Deselect the Configure Lookup window with default fields check box.
9. Click Finish to save the layout.

### Enabling a Search Layout for Oracle CRM On Demand Financial Services Edition

Now you must enable the search layout you configured in the previous procedure for each role in Oracle CRM On Demand Financial Services Edition.

### To enable a search layout for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to Admin, User Management and Access Controls, and then the Role Management view.

2. Click the edit link next to the role that you want to enable in the Search Layout.  
The Role Management wizard opens.
3. Go to Step 7 of the wizard, Search Layout Assignment and on the Insurance Property record type, select the search layout name that you configured in the previous procedure.
4. Click Finish.

## Setting Up Related Information Page Layouts for Oracle CRM On Demand Financial Services Edition

It is recommended that you set up related information page layouts for each role that you intend to create in Oracle CRM On Demand Financial Services Edition.

When setting up a related information page layout, you can create a new layout, or you can copy or edit an existing layout. You can add fields to the related page layout as well as to the sections within the page, and you can also expose the related information in the page layout.

In Oracle CRM On Demand Financial Services Edition, there are 13 record types that have preconfigured fields for common industry use. These objects have many of the related information layouts created for you, but you can make additions as necessary.

Company administrators typically set up the related information layouts for the following record types for each role in the Financial Services edition:

- Contact
- Financial Account
- Financial Product
- Policy

The tables after this procedure show the details of the page layouts and related information sections that company administrators typically set up for Oracle CRM On Demand Financial Services Edition.

This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

### To set up a related information page layout for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Application Customization view.
2. In the Record Type Setup section, click the link for the required record type.
3. In the Page Layout Management section, click the Related Information Page Layout.
4. In the Related Information Setup section, select the related information type you want to customize.  
The Related Information Layout page for the selected related information type appears.

**Note:** The items in the Related Information Setup section vary depending on which record type you select.

If you want to create a copy of an existing layout, or to create a new layout, perform the following steps:

5. On the record type Page Layout page, click the Copy link next to a layout to create a new layout that is based on an existing layout, or click New Layout on the title bar to create an entirely new layout.

The Page Layout wizard opens.

6. In Step 1 of the wizard, enter a name for the layout and (optionally) a description and click Next.
7. In Step 2 Field Setup, select fields from the available Fields list and use the up and down arrows next to the Selected Fields list to organize the fields in the order you want.

**Note:** For more information on field setup, see *Configuring Field Setup for Oracle CRM On Demand Financial Services Edition*.

8. Click Finish to save the layout.

The following table shows the sections that company administrators typically set up for related information page layouts for each role in Oracle CRM On Demand Financial Services Edition.

| Related Information Setup | Field Setup                   |
|---------------------------|-------------------------------|
| Financial Account Holders | Financial Account Holder Name |
|                           | Financial Account             |
|                           | Role                          |
|                           | Financial Account Type        |
|                           | Balance                       |
|                           | Joint                         |
|                           | Held Away                     |
|                           | Primary Account               |
|                           | Open Date                     |
| Financial Transactions    | Financial Product Name        |
|                           | Transaction Type              |
|                           | Quantity                      |
|                           | Value                         |
|                           | Transaction Price             |
|                           | Transaction Date Time         |

| Related Information Setup | Field Setup         |
|---------------------------|---------------------|
|                           | Transaction Period  |
|                           | Transaction ID      |
|                           | Transaction Source  |
| Involved Party            | Involved Party Name |
|                           | Claim Number        |
|                           | Status              |
|                           | Loss Code           |
|                           | Loss Type           |
|                           | Reported by         |
|                           | Role                |
|                           | Role in Accident    |
|                           | Injury Summary      |

The following table shows the sections that company administrators typically set up for related information page layouts for each financial account in Oracle CRM On Demand Financial Services Edition.

| Related Information Setup | Field Setup                          |
|---------------------------|--------------------------------------|
| Financial Account Holders | Financial Account Holder Name        |
|                           | Financial Account Holder: First Name |
|                           | Financial Account Holder:            |
|                           | Role                                 |
|                           | Financial Account Holder: Email      |
|                           | Primary Account                      |

| Related Information Setup | Field Setup |
|---------------------------|-------------|
|                           | Joined Date |

The following table shows the sections that company administrators typically set up for related information page layouts for each financial product in Oracle CRM On Demand Financial Services Edition.

| Related Information Setup | Field Setup              |
|---------------------------|--------------------------|
| Financial Transactions    | Financial Account Number |
|                           | Transaction Type         |
|                           | Quantity                 |
|                           | Value                    |
|                           | Transaction Price        |
|                           | Transaction Date Time    |
|                           | Transaction Period       |
|                           | Transaction ID           |
|                           | Transaction Source       |

The following table shows the sections that company administrators typically set up for related information page layouts for each policy in Oracle CRM On Demand Financial Services Edition.

| Related Information Setup | Field Setup                |
|---------------------------|----------------------------|
| Policy Holder             | Policy Holder Name         |
|                           | Contact Holder             |
|                           | Contact Holder: First Name |
|                           | Contact Holder: Last Name  |
|                           | Role                       |
|                           | Insured Type               |

| Related Information Setup | Field Setup           |
|---------------------------|-----------------------|
|                           |                       |
|                           | Effective Date        |
|                           | Holder Percentage     |
|                           | Contact Holder: Email |
| Claim                     | Claim Number          |
|                           | Status                |
|                           | Loss Code             |
|                           | Loss Type             |
|                           | Report Number         |
|                           | Reported by           |
|                           | Report Date           |
| Coverage                  | Coverage              |
|                           | Individual Limit      |
|                           | Total Limit           |
|                           | Deductible            |
| Policy Attachment         | Attachment Name       |
|                           | Size                  |
|                           | Type                  |
|                           | Created By            |
|                           | Modified By           |
|                           | Last Modified         |

# Modifying Sales Stages for Oracle CRM On Demand Financial Services Edition

Complete the steps in the following procedure to modify the sales stages. This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

## To modify the sales stages for Oracle CRM On Demand Financial Services Edition

1. In Oracle CRM On Demand, navigate to the Admin screen and then the Data Rules & Assignment view.
2. In the Sales Methodology section, click the Sales Processes link.
3. On the Sales Process List page, click the Sales Process Name link.
4. In the Sales Stage title bar, click New, or in the row for an existing sales stage, click Edit.
5. On the Sales Stage Edit page, enter a name for the sales stage or edit the name for an existing one.
6. On the Sales Stage Edit page, enter a number in the Order field for the sales stage, or edit the Order # (number) for an existing one.  
Order # (number) corresponds to the position of the sales stage in the picklist.
7. Click Save.

Repeat these steps for each sales stage that you want to add or edit.

The following table shows the suggested sales stages for Oracle CRM On Demand Financial Services Edition:

| Sales Stage                | Default Probability | Order |
|----------------------------|---------------------|-------|
| New Opportunity            | 10                  | 1     |
| Initial Communication      | 20                  | 2     |
| Discovery                  | 30                  | 3     |
| Opportunity Analysis       | 40                  | 4     |
| Solution Development       | 50                  | 5     |
| Solution Presentation      | 60                  | 6     |
| Client/Prospect Evaluation | 70                  | 7     |
| Commitment to Buy          | 80                  | 8     |
| Paperwork Signed           | 90                  | 9     |

| Sales Stage | Default Probability | Order |
|-------------|---------------------|-------|
| Closed/Won  | 100                 | 10    |
| Closed/Lost | 0                   | 11    |

## Setting Up Access Profiles for Financial Services Roles

You must set up two profiles for each financial services role:

- **Default access profile.** Sets the access levels for records not owned by the user (or by the user's group).
- **Owner access profile.** Sets the access levels for the records owned by the user, by the user's group, or by someone who reports to the user (if manager visibility is enabled).

Complete the steps in the following procedure for each of the required access profiles. This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

### To set up the default access and owner access profiles for a financial services role

1. In Oracle CRM On Demand, navigate to the Admin screen, User Management and Access Controls, and then the Access Profiles view.
2. Click the Copy link on the appropriate profile, as follows:
  - If you are setting up a default access profile, click the Copy link on a default access profile that is similar to the one you want to set up.  
For example, to create the default access profile for a financial advisor, click the Copy link on the Field Sales Rep Default Access Profile.
  - If you are setting up an owner access profile, click the Copy link on an owner access profile that is similar to the one you want to set up.  
For example, to create the owner access profile for a financial advisor, click the Copy link on the Field Sales Rep Owner Access Profile.

The Access Profile Wizard opens.

3. In Step 1 of the wizard, enter a name for the access profile (for example, Financial Advisor Default Access Profile or Financial Advisor Owner Access Profile).
4. In the wizard, go to Step 2 (Specify Access Levels), and change the access settings for the role, as necessary.  
For example, the following table lists the access settings that company administrators typically configure for a financial advisor role.

| Record Type | Related Information | Default Access   | Owner Access     |
|-------------|---------------------|------------------|------------------|
| Claim       | Claim               | Read/Edit/Delete | Read/Edit/Delete |

| Record Type       | Related Information        | Default Access   | Owner Access     |
|-------------------|----------------------------|------------------|------------------|
| Claim             | Activities                 | View             | View             |
| Claim             | Damages                    | View             | View             |
| Claim             | Involved Parties           | View             | View             |
| Claim             | Service Requests           | View             | View             |
| Contact           | Contact Interests          | Full             | Full             |
| Contact           | Contact Relationships      | Read/Create      | Full             |
| Contact           | Households                 | Full             | Full             |
| Contact           | Portfolios                 | Full             | Full             |
| Contact           | Referrals                  | View             | View             |
| Coverage          | Coverage                   | Read/Edit/Delete | Read/Edit/Delete |
| Damage            | Damage                     | Read/Edit/Delete | Read/Edit/Delete |
| Financial Account | Financial Account          | Read/Edit/Delete | Read/Edit/Delete |
| Financial Account | Activities                 | View             | View             |
| Financial Account | Books                      | Full             | Full             |
| Financial Account | Custom Objects (All)       | Full             | Full             |
| Financial Account | Financial Account          | View             | View             |
| Financial Account | Financial Account Holders  | View             | View             |
| Financial Account | Financial Account Holdings | View             | View             |

| Record Type       | Related Information        | Default Access   | Owner Access     |
|-------------------|----------------------------|------------------|------------------|
|                   |                            |                  |                  |
| Financial Account | Financial Plans            | View             | View             |
| Financial Account | Financial Transactions     | View             | View             |
| Financial Account | Leads                      | View             | View             |
| Financial Account | Opportunities              | View             | View             |
| Financial Account | Policies                   | View             | View             |
| Financial Account | Service Requests           | View             | View             |
| Financial Account | Financial Account Holder   | Read/Edit/Delete | Read/Edit/Delete |
| Financial Account | Financial Account Holdings | Read/Edit/Delete | Read/Edit/Delete |
| Financial Plan    | Financial Plan             | Read/Edit/Delete | Read/Edit/Delete |
| Financial Plan    | Activities                 | View             | View             |
| Financial Plan    | Books                      | Full             | Full             |
| Financial Plan    | Leads                      | View             | View             |
| Financial Plan    | Opportunities              | View             | View             |
| Financial Plan    | Service Requests           | View             | View             |
| Financial Product | Financial Product          | Read/Edit/Delete | Read/Edit/Delete |
| Financial Product | Coverages                  | View             | View             |
| Financial Product | Financial Account Holdings | View             | View             |

| Record Type           | Related Information    | Default Access   | Owner Access     |
|-----------------------|------------------------|------------------|------------------|
| Financial Product     | Financial Products     | View             | View             |
| Financial Product     | Financial Transactions | View             | View             |
| Financial Product     | Financial Transaction  | Read/Edit/Delete | Read/Edit/Delete |
| Financial Transaction | Financial Transactions | View             | View             |
| Financial Transaction | Service Requests       | View             | View             |
| Household             | Household              | Read/Edit/Delete | Read/Edit/Delete |
| Household             | Attachments            | Read-Only        | Read-Only        |
| Household             | Completed Activities   | View             | View             |
| Household             | Contacts               | Full             | Full             |
| Household             | Household Team         | Full             | Full             |
| Household             | Leads                  | Read-Only        | Read-Only        |
| Household             | Notes                  | Read-Only        | Read-Only        |
| Household             | Open Activities        | View             | View             |
| Household             | Opportunities          | View             | View             |
| Household             | Portfolios             | Read-Only        | Read-Only        |
| Household             | Service Requests       | View             | View             |
| Insurance Property    | Insurance Property     | Read/Edit/Delete | Read/Edit/Delete |
| Insurance Property    | Coverages              | View             | View             |

| Record Type        | Related Information  | Default Access   | Owner Access     |
|--------------------|----------------------|------------------|------------------|
|                    |                      |                  |                  |
| Insurance Property | Damages              | View             | View             |
| Policy             | Policy               | Read/Edit/Delete | Read/Edit/Delete |
| Policy             | Activities           | View             | View             |
| Policy             | Policy Attachment    | Read/Edit/Delete | Read/Edit/Delete |
| Policy             | Books                | Full             | Full             |
| Policy             | Claims               | View             | View             |
| Policy             | Coverages            | View             | View             |
| Policy             | Custom Objects (All) | Full             | Full             |
| Policy             | Insurance Properties | View             | View             |
| Policy             | Leads                | View             | View             |
| Policy             | Opportunities        | View             | View             |
| Policy             | Policies             | View             | View             |
| Policy             | Policy Holders       | View             | View             |
| Policy             | Service Requests     | View             | View             |
| Policy             | Policy Holder        | Read/Edit/Delete | Read/Edit/Delete |
| Portfolio          | Portfolio            | Read/Edit        | Read/Edit/Delete |
| Portfolio          | Completed Activities | View             | View             |

| Record Type | Related Information    | Default Access | Owner Access |
|-------------|------------------------|----------------|--------------|
| Portfolio   | Contacts               | Full           | Full         |
| Portfolio   | Open Activities        | View           | View         |
| Portfolio   | Portfolio Sub-Accounts | View           | View         |
| Portfolio   | Team                   | Full           | Full         |

5. Click Finish.

## Creating Financial Services Roles

Complete the steps in the following procedure to create a financial services role. This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

### To create a financial services role

1. In Oracle CRM On Demand, navigate to Admin, User Management and Access Controls, and then the Role Management view.
2. Click the Copy link on an existing role that is similar to the role you want to create.

For example, to create the Financial Advisor role, copy the Field Sales Rep role.

The Role Management wizard opens.

3. In Step 1 of the wizard, enter the role name (for example, Financial Advisor) and description.
4. In the wizard, go to Step 2 (Record Type Access), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services settings that company administrators typically configure for a financial advisor role.

| Record Type | Has Access | Can Create | Can Read All Records |
|-------------|------------|------------|----------------------|
| Contact     | Selected   | Selected   | Not Selected         |
| Household   | Selected   | Selected   | Not Selected         |
| Portfolio   | Selected   | Selected   | Not Selected         |
| Claim       | Selected   | Selected   | Not Selected         |

| Record Type               | Has Access | Can Create | Can Read All Records |
|---------------------------|------------|------------|----------------------|
| Coverage                  | Selected   | Selected   | Not Selected         |
| Damage                    | Selected   | Selected   | Not Selected         |
| Financial Account         | Selected   | Selected   | Not Selected         |
| Financial Account Holders | Selected   | Selected   | Not Selected         |
| Financial Plan            | Selected   | Selected   | Not Selected         |
| Financial Product         | Selected   | Selected   | Not Selected         |
| Financial Transaction     | Selected   | Selected   | Not Selected         |
| Financial Holdings        | Selected   | Selected   | Not Selected         |
| Insurance Property        | Selected   | Selected   | Not Selected         |
| Involved Party            | Selected   | Selected   | Not Selected         |
| Policy                    | Selected   | Selected   | Not Selected         |
| Policy Holder             | Selected   | Selected   | Not Selected         |

5. In the wizard, go to Step 3 (Access Profiles), and select the access profiles that you created earlier for the role.
6. In the wizard, go to Step 4 (Privileges), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services privileges that company administrators typically configure for a financial advisor role.

| Role              | Category | Privilege                                               | Assign       |
|-------------------|----------|---------------------------------------------------------|--------------|
| Financial Advisor | CRM      | Manage Contact Interest Access                          | Not Selected |
|                   | CRM      | Manage Extended Contact and Account Relationship Access | Not Selected |

| Role | Category                              | Privilege                       | Assign       |
|------|---------------------------------------|---------------------------------|--------------|
|      | CRM: Sales                            | Manage Referrals                | Not Selected |
|      | Industry-Specific: Financial Services | Manage Households Access        | Not Selected |
|      | Industry-Specific: Financial Services | Manage Portfolios Access        | Not Selected |
|      | Industry-Specific: Financial Services | Manage Banking Custom Objects   | Selected     |
|      | Industry-Specific: Financial Services | Manage Insurance Custom Objects | Selected     |

7. In the wizard, go to Step 5 (Tab Access & Order), and adjust the settings for the role, as necessary.

For example, the following table shows the financial services settings that company administrators typically configure for a financial advisor role.

| Role              | Tab                       | Move To       |
|-------------------|---------------------------|---------------|
| Financial Advisor | Households                | Selected Tabs |
|                   | Portfolios                | Selected Tabs |
|                   | Claim                     | Selected Tabs |
|                   | Coverage                  | Selected Tabs |
|                   | Damage                    | Selected Tabs |
|                   | Financial Account         | Selected Tabs |
|                   | Financial Account Holders | Selected Tabs |
|                   | Financial Plan            | Selected Tabs |
|                   | Financial Product         | Selected Tabs |

| Role | Tab                   | Move To       |
|------|-----------------------|---------------|
|      |                       |               |
|      | Financial Transaction | Selected Tabs |
|      | Financial Holdings    | Selected Tabs |
|      | Insurance Property    | Selected Tabs |
|      | Involved Party        | Selected Tabs |
|      | Policy                | Selected Tabs |
|      | Policy Holder         | Selected Tabs |

8. In the wizard, go to Step 6 (Page Layout Assignment), and assign a page layout to each record type.
9. In the wizard, go to Step 7 (Search Layout Assignment), and assign a search layout to each record type.  
For information about setting up search layouts, see *Oracle CRM On Demand Online Help*.
10. In the wizard, go to Step 8 (Homepage Layout Assignment), and assign a homepage layout to each record type.  
For information about setting up homepage layouts, see *Oracle CRM On Demand Online Help*.
11. Click Finish.

## Configuring Custom Objects for Policies

This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

You can associate custom objects 1-40 with the Policy record. Custom objects 1-40 can be customized for data specific to insurance policies.

The relationship between the Policy record type and Custom Objects is one-to-many. You can create many-to-many relationships for custom object record types by using another custom object record type as an intersection table. For more information about custom objects and many-to-many relationships, see *Oracle CRM On Demand Online Help*.

To configure custom objects:

- Verify that the administrator's role is set up for the custom objects
- Add the Custom Objects to the Policy record type page layout

Complete the steps in the following procedure to verify the administrator's role is set up for custom objects.

### Verifying the administrator's role is set up for custom objects

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 User Management and Access Controls link.
3. In the Access Profile Management section, click the Access Profiles link.
4. On the Access Profiles page, click the Edit link for the role that you would like to edit, and do the following:
  - a. Navigate to Step 2 (Specify Access Levels) and click the Related Information next to the Policy object.
  - b. On the Related Information page, find Custom Objects, and select View for the Access Level.
  - c. Click Finish.

Complete the steps in the following procedure to add custom objects to the Policy record type page layout.

## To add the custom objects to the Policy record type page layout

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click Application Customization.
3. In the Record Types Setup section, click the link for the Policy record type.
4. In the Page Layout Management section, click the Related Information Layout link.
5. On the Related Information Layout page, click the Edit link next to a layout.

The Related Information Layout wizard opens.
6. In the wizard, go to Step 4 (Related Information), and use the directional arrows to add Custom Objects option to the Available section.
7. Click Finish to save the record.

## Configuring Books

This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

Books are an efficient method of organizing and segregating records, so that users can collaborate without being team members for each record.

You can configure books for the following records:

- Policy
- Financial Account
- Financial Plan

A book can be associated with a record in two ways:

- By adding the book to the Book related information list on a Policy record.
- Automatically, through a workflow rule or batch assignment.

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

Complete the steps in the following procedure to verify the administrator's role is set up for books.

## Verifying the administrators role is set up 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 of the Admin Homepage, click the User Management and Access Controls link.

3. In the Access Profile Management section, click the Access Profiles link.
4. On the Access Profiles page, click the Edit link for the Administrator Default Access Profile, and do the following:
  - a. Navigate to Step 2 (Specify Access Levels) and click the Related Information next to the record type object.
  - b. On the Related Information page, find Books, and select Full for the Access Level.
  - c. Click Finish.
5. On the Access Profiles page, click the Edit link for the Administrator Owner Access Profile, and do the following:
  - a. Navigate to Step 2 (Specify Access Levels) and click the Related Information next to the record type object.
  - b. On the Related Information page, find Books, and select Full for the Access Level.
  - c. Click Finish.

Complete the steps in the following procedure to add books to the record type page layout.

## To add the book to page layout

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click Application Customization.
3. In the Record Types Setup section, click the link for the record type.
4. In the Page Layout Management section, click the record type Page Layout link.
5. On the Policy Page Layout page, click the Edit link next to a layout.

The Page Layout wizard opens.

6. In the wizard, go to Step 4 (Related Information), and use the directional arrows to add the Books option to the Available section.
7. Click Finish to save the record.

For more information about creating books, see *Oracle CRM On Demand Online Help*.

## Configuring My Team Policies List

This task is a step in *Process of Configuring Oracle CRM On Demand Financial Services Edition*.

Insurance agent managers can configure the My Team Policies List in the Policy List page to show all the policies owned by their subordinates. For more information about creating lists, see *Oracle CRM On Demand Online Help*.

Complete the steps in the following procedure to add the My Team Policies list to the Policy List page.

## To configure My Team Policies list

1. Navigate to the Policy Homepage.
2. In the Policy List page, click the Manage Lists link.
3. Manage Policy Lists page, Click on New List
4. In the Search In section, select the All records I or my subordinates own option, and then click Save.
5. In the List Name field, enter My Team Policies.
6. For List Accessibility, select one of the following options based on your user role:

- **Private.** Allows you alone to see the filtered list.
- **Public.** Makes the list available to all employees. Public lists appear on the record Homepage for all employees at your company.
- **Role Specific.** Make the list available only to users with a specific role.

**7.** Click Save and Run.



# 4 Configuring Workflows for the Producer Success Model

## Configuring Workflows for the Producer Success Model

This chapter describes how to configure workflow rules to support the Producer Success Model in Oracle CRM On Demand Financial Services Edition. It includes the following topics.

- *About Configuring Workflows for the Producer Success Model*
- *Configuring Workflow Rules and Actions for the Producer Success Model*

## About Configuring Workflows for the Producer Success Model

In Oracle CRM On Demand, you can use workflow rules to specify that one or more actions must be performed automatically each time a specified event occurs. You can configure as many workflow rules as you want to implement your business processes.

The Producer Success Model in Oracle CRM On Demand is a framework that uses workflow rules to automate the creation of activities, allowing insurance agents or financial advisors to follow up their leads and stay in touch with their clients on a regular basis.

In the Producer Success Model, the following terms are used:

- **Producer.** A *producer* is an insurance agent or financial advisor.
- **Client.** A *client* is a contact with whom your company maintains a relationship on a long-term basis so that you can monitor changes in the client's situation and identify opportunities to cross-sell additional products to the client. Clients usually also seek advice on which products fit their needs.

To support the Producer Success Model, you configure a set of workflow rules and actions. The workflow rules that are specific to the Producer Success Model include:

- A workflow rule that creates a task to call the lead on the next working day every time a new Lead record is created. For more information about this workflow rule, see *Workflow Rule for Creating a Referral Call When a New Lead is Created*.
- Workflow rules that create a followup task to call a lead, based on the value in the Call Result field in the Task Detail page. For more information about these workflow rules, see *Workflow Rules for Creating Followup Calls Based on Call Results*.
- Workflow rules that create tasks to help producers to keep in regular contact with clients. For more information about these workflow rules, see *Workflow Rules for Scheduling Calls with Clients*.

For more information about Producer Success Model workflows, see 1801375.1 (Article ID) on My Oracle Support or from Oracle CRM On Demand — Training and Support Center.

# Configuring Workflow Rules and Actions for the Producer Success Model

The following procedures describe the workflow rules and actions that you must create to support the Producer Success Model:

- *Workflow Rule for Creating a Referral Call When a New Lead is Created*
- *Workflow Rules for Creating Followup Calls Based on Call Results*
- *Workflow Rules for Scheduling Calls with Clients*

To create a workflow rule, complete the following procedure.

## To create a workflow rule

1. In Oracle CRM On Demand, click Admin.
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 Name field, enter a unique name.
5. To make the workflow rule active, select the Active option.
6. In the Record Type menu, select the appropriate record type.
7. In the Trigger Event menu, select the appropriate trigger event.
8. (Optional) In the Workflow Rule Condition section of the Workflow Rule Detail page, click the *fx* icon and add an expression.
9. Save the rule.

## Creating a Workflow Action

To create a workflow action, complete the following procedure.

### To create a workflow action

1. In the Workflow Rule Detail page, in the Actions title bar, click Menu and select Create Task.
2. In the Workflow Action Edit page, enter a name for the action.
3. If you want to enable the action, select the Active check box.
4. In the Owner menu, select Relative User on Record, and then select the appropriate task owner.
5. In the Type menu, select the appropriate task type.
6. In the Due Date menu, enter the expression that evaluates to the appropriate 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.

7. In the Subject field, enter the subject.
8. Save the action.

Repeat these procedures until you have configured all of the necessary workflow rules and actions.

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

## Workflow Rule for Creating a Referral Call When a New Lead is Created

This topic provides details of the workflow rule and action that you must configure so that a task is automatically created when a lead record is saved for the first time. A referral call is created. It is scheduled on the next working day after the lead is created. For example, if the lead is created on a Friday or Saturday, the call is scheduled for the following Monday. The owner of the task is the owner of the lead record.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: `[{FieldName}]`. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

### Workflow Rule Details

This topic describes the details of the workflow rule.

#### Record Type

The record type is a Lead record.

#### Trigger Event

The trigger event is When New Record Saved.

#### Rule Condition

Not applicable. Leave this section blank.

### Workflow Action Details

This topic describes the details of the workflow action.

#### Action Type

The action type is Create Task.

#### Task Type

The task type is a Referral Call.

## Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")="7"),Today()+3,Today()+2),Today()+1)
```

## Subject

The subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Referral Call")%%-%%JoinFieldValue('<Lead>', [<LeadId>], '<LeadFullName>')%%
```

# Workflow Rules for Creating Followup Calls Based on Call Results

This topic provides details of the workflow rules and actions that you must configure so that a followup task is created when a producer updates the value in the Call Result field in the Task Detail page after making a call to a lead or a client.

The types of calls that producers make to leads or clients include the following:

- **Referral calls.** Referral calls are calls that producers must make to follow up on leads.
- **Birthday calls.** Birthday calls are calls that producers make to existing leads or clients on their birthday.
- **Review calls.** Review calls are calls that producers make to leads or clients when it has been six months since the last call with the lead.

The producer can capture the result of these calls in the Call Result field on the Task Detail page. The values for the Call Result field include the following:

- **No Reach.** The producer selects this value if the lead is unreachable.
- **Stay In Touch.** The producer selects this value if the lead or contact does not want to talk today but the lead wants the producer to stay in touch.
- **Dead File.** The producer selects this value if the lead does not want to talk today and does not want to be contacted again
- **Appointment.** The producer selects this value if the lead or client is ready for an appointment.

The workflow rules in this topic create a followup task for calls that result in the No Reach value or the Stay in Touch value. The type of the followup task depends on the type of the original task.

- **Call result value is No Reach.** If the Call Result value is No Reach, the workflow rule schedules a followup task for the next working day for the lead or client record owner.
- **Call result value is Stay in Touch.** If the Call Result value is Stay in Touch, the workflow rule schedules a followup task to call the lead six months from now or one week prior to the lead's or client's birthday, whichever occurs first.

## Followup Calls for Referral Calls Where the Result Is No Reach

This workflow rule is triggered when a producer calls a lead through a referral call and then updates the Call Result field in the Task edit page to No Reach. The workflow rule creates a referral call followup task for the following workday.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

### Workflow Rule Details

This topic describes the details of the workflow rule.

#### Record Type

The record type is an Activity record.

#### Trigger Event

The trigger event is When Modified Record Saved.

#### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Referral Call") AND [<CallResult>]=LookupValue("OD_CALL_RESULT",  
"No Reach") AND PRE('<CallResult>') IS NULL
```

### Workflow Action Details

This topic describes the details of the workflow action.

## Action Type

The action type is Create Task.

## Task Type

The task type is a Referral Call.

## Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")="7"),Today()+3,Today()+2),Today()+1)
```

## Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Referral Call")%%-%%JoinFieldValue('<Lead>', [<LeadId>], '<LeadFullName>')%%
```

# Followup Calls for Review Calls Where the Result Is No Reach

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to No Reach. The workflow rule creates a review call followup task for the following workday.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

### Record Type

The record type is an Activity Record.

### Trigger Event

The trigger event is When Modified Record Saved.

### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Review Call") AND [<CallResult>]=LookupValue("OD_CALL_RESULT",  
"No Reach") AND PRE('<CallResult>') IS NULL
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Review Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay  
(Today()+1)/7, 8, 1), "0")="7"),Today()+3,Today()+2),Today()+1)
```

## Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Review Call")%%-%%IIf([<PrimaryContactId>] <> "No Match Row Id",  
JoinFieldValue('<Contact>', [<PrimaryContactId>], '<ContactFullName>'), JoinField Value  
( '<Lead>', [<LeadId>], '<LeadFullName>' ))%%
```

## Followup Calls for Birthday Calls Where the Result Is No Reach

This workflow rule is triggered when a producer calls a lead or client through a birthday call and then updates the Call Result field in the Task edit page to No Reach. The workflow rule creates a review call followup task for the following workday.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

### Record Type

The record type is an Activity record.

### Trigger Event

The trigger event is when Modified Record Saved.

## Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Birthday Call") AND [<CallResult>]=LookupValue("OD_CALL_RESULT",  
"No Reach") AND PRE('<CallResult>') IS NULL
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Review Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+1)/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay  
(Today()+1)/7, 8, 1), "0")="7"),Today()+3,Today()+2),Today()+1)
```

### Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Review Call")%%-%%IIf([<PrimaryContactId>] <> "No Match Row Id",  
JoinFieldValue('<Contact>', [<PrimaryContactId>], '<ContactFullName>'), JoinFieldValue('<Lead>',  
[<LeadId>], '<LeadFullName>'))%%
```

## Followup Calls for Referral or Review Calls Where the Result Is Stay in Touch and the Birthday Is Not in the Current Week and Is Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a referral call or a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client does not occur during the current week but does occur within six months, the workflow rule creates a birthday call followup task to call the lead or client a week before the birthday.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: `{{FieldName}}`. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

### Workflow Rule Details

This topic describes the details of the workflow rule.

#### Record Type

The record type in an Activity record.

#### Trigger Event

The trigger event is When Modified Record Saved.

#### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
([<Type>]=LookupValue("TODO_TYPE", "Referral Call") OR [<Type>]=LookupValue("TODO_TYPE",  
"Review Call")) AND [<PrimaryContactId> = "No Match Row Id" AND [<CallResult>]=LookupValue  
("OD_CALL_RESULT", "Stay In Touch") AND PRE('<CallResult>') IS NULL AND JoinFieldValue('<Lead>',  
[<LeadId>], '<DateofBirth>') IS NOT NULL AND JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Lead>',  
[<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid(JoinFieldValue  
('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today()+Duration("P1Y"), 'YYYY'), Mid(JoinFieldValue  
('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY'))>JulianDay(Today()+7) AND JulianDay  
(IIf(JulianDay(Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY'))  
< JulianDay(Today()), Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today()  
+Duration("P1Y"), 'YYYY'), Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(),  
'YYYY'))<=JulianDay(Today()+Duration("P6M"))
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Birthday Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
Today()+JulianDay(Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+IIf(JulianDay  
(Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY')) <  
JulianDay(Today()), ToChar(Today()+Duration("P1Y"), 'YYYY'), ToChar(Today(), 'YYYY')))-JulianDay  
(Today())-(IIf(IfNull(Mid(1.0*(JulianDay(Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>')  
, 1, 6)+IIf(JulianDay(Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(),  
'YYYY')) < JulianDay(Today()), ToChar(Today()+Duration("P1Y"), 'YYYY'), ToChar(Today(), 'YYYY'))  
-7)/7, 8, 1), "0")>="7", (IIf(IfNull(Mid(1.0*(JulianDay(Mid(JoinFieldValue('<Lead>', [<LeadId>], '  
<DateofBirth>'), 1, 6)+IIf(JulianDay(Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)  
+ToChar(Today(), 'YYYY')) < JulianDay(Today()), ToChar(Today()+Duration("P1Y"), 'YYYY'), ToChar  
(Today(), 'YYYY')))-7)/7, 8, 1), "0")="7", 5, 6)), 7))
```

### Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Birthday Call")%%-%JoinFieldValue('<Lead>', [<LeadId>],  
'<LeadFullName>')%%%
```

## Followup Calls for Birthday Calls Where the Result Is Stay in Touch and the Birthday Is Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a birthday call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is more than six months away, the workflow rule creates a review call followup task to call the lead or client six months from now.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

### Record Type

The record type is an Activity record.

### Trigger Event

The trigger event is When Modified Record Saved.

### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Birthday Call") AND [<CallResult>]=LookupValue("OD_CALL_RESULT",  
"Stay In Touch") AND PRE('<CallResult>') IS NULL AND ([<PrimaryContactId>] <> "No Match Row Id" OR  
[<LeadId>] <> "No Match Row Id")
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Review Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")>="7"),IIf((IfNull(Mid  
(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")="7"),Today()+Duration("P6M")+2,Today()  
+Duration("P6M")+1),Today()+Duration("P6M"))
```

## Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Review Call")%%-%%IIf([<PrimaryContactId>] <> "No Match Row Id",  
JoinFieldValue('<Contact>', [<PrimaryContactId>], '<ContactFullName>'), JoinFieldValue('<Lead>',  
[<LeadId>], '<LeadFullName>'))%%
```

## Followup Calls for Review Calls where the Result is Stay in Touch and the Birthday is Within the Current Week or Unknown

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is not known or the birthday is within the current week, the workflow rule creates a review call followup task to call the lead or client six months from now.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

### Record Type

The record type is an Activity record.

## Trigger Event

The trigger event is When Modified Record Saved.

## Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
([<Type>]=LookupValue("TODO_TYPE","Review Call") OR [<Type>]=LookupValue("TODO_TYPE","Referral Call")) AND [<PrimaryContactId>] = "No Match Row Id" AND [<CallResult>]=LookupValue("OD_CALL_RESULT", "Stay In Touch") AND PRE('<CallResult>') IS NULL AND IIf(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>') IS NOT NULL, (JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY'))<JulianDay(Today()), Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today()+Duration("PLY"), 'YYYY'), Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY'))<=JulianDay(Today()+7)), [<LeadId>]<>"No Match Row Id")
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Review Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")>="7"), IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")="7"), Today()+Duration("P6M")+2, Today()+Duration("P6M")+1), Today()+Duration("P6M"))
```

### Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-%JoinFieldValue('<Lead>', [<LeadId>], '<LeadFullName>')%%%
```

## Followup Calls for Review Calls Where the Result Is Stay in Touch and the Birthday Is Not Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is more than six months from now, the workflow rule creates a review call followup task to call the lead or client six months from now.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

### Workflow Rule Details

This topic describes the details of the workflow rule.

#### Record Type

The record type is an Activity record.

#### Trigger Event

The trigger event is When Modified Record Saved.

#### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[(<Type>]=LookupValue("TODO_TYPE","Review Call") OR [<Type>]=LookupValue("TODO_TYPE",  
"Referral Call")) AND [<PrimaryContactId>] = "No Match Row Id" AND [<CallResult>]=LookupValue  
("OD_CALL_RESULT", "Stay In Touch") AND PRE('<CallResult>') IS NULL AND JoinFieldValue('<Lead>',  
[<LeadId>], '<DateofBirth>') IS NOT NULL AND JulianDay(If(JulianDay(Mid(JoinFieldValue('<Lead>',  
[<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY'))<JulianDay(Today()), Mid(JoinFieldValue  
('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today()+Duration("PLY"), 'YYYY'),  
Mid(JoinFieldValue('<Lead>', [<LeadId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY'))>JulianDay  
(Today()+Duration("P6M"))
```

### Workflow Action Details

This topic describes the details of the workflow action.

## Action Type

The action type is Create Task.

## Task Type

The task type is a Review Call.

## Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IsNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")>="7"),IIf((IsNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P6M"))
```

## Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%%-%JoinFieldValue('<Lead>', [<LeadId>], '<LeadFullName>')%%%
```

# Followup Calls for Review Calls Where the Result Is Stay in Touch and the Birthday Is Not in the Current Week and Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is not in the current week and is not more than six months from now, the workflow rule creates a review call followup task to call the lead or client a week before the birthday.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

### Record Type

The record type is an Activity record.

### Trigger Event

The trigger event is When Modified Record Saved.

### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE", "Review Call") AND [<CallResult>]=LookupValue("OD_CALL_RESULT",  
"Stay In Touch") AND PRE('<CallResult>') IS NULL AND JoinFieldValue('<Contact>',  
[<PrimaryContactId>], '<DateofBirth>') IS NOT NULL AND JulianDay(IIf(JulianDay(Mid(JoinFieldValue  
('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay  
(Today(), Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6) + ToChar(Today()  
+ Duration("P1Y"), 'YYYY'), Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6)  
+ ToChar(Today(), 'YYYY')) > JulianDay(Today() + 7) AND JulianDay(IIf(JulianDay(Mid(JoinFieldValue  
('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay  
(Today(), Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6) + ToChar  
(Today() + Duration("P1Y"), 'YYYY'), Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>],  
'<DateofBirth>'), 1, 6) + ToChar(Today(), 'YYYY')) <= JulianDay(Today() + Duration("P6M"))
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Birthday Call.

## Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
Today() + JulianDay(Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6) + IIf  
(JulianDay(Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6) + ToChar  
(Today(), 'YYYY') < JulianDay(Today()), ToChar(Today() + Duration("P1Y"), 'YYYY'), ToChar(Today(),  
'YYYY')) - JulianDay(Today()) - (IIf(IfNull(Mid(1.0 * (JulianDay(Mid(JoinFieldValue('<Contact>',  
[<PrimaryContactId>], '<DateofBirth>'), 1, 6) + IIf(JulianDay(Mid(JoinFieldValue('<Contact>',  
[<PrimaryContactId>], '<DateofBirth>'), 1, 6) + ToChar(Today(), 'YYYY') < JulianDay(Today()),  
ToChar(Today() + Duration("P1Y"), 'YYYY'), ToChar(Today(), 'YYYY')) - 7) / 7, 8, 1), "0") >= "7", (IIf  
(IfNull(Mid(1.0 * (JulianDay(Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'),  
1, 6) + IIf(JulianDay(Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6)  
+ ToChar(Today(), 'YYYY') < JulianDay(Today()), ToChar(Today() + Duration("P1Y"), 'YYYY'), ToChar  
(Today(), 'YYYY')) - 7) / 7, 8, 1), "0") = "7", 5, 6)), 7))
```

## Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Birthday Call")%%% - %%%JoinFieldValue('<Contact>', [<PrimaryContactId>],  
'<ContactFullName>') %%%
```

## Followup Calls for Review Calls Where the Result Is Stay in Touch and the Birthday Is Not in the Current Week or Is Unknown

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client is not in the current week or the birthday is not known, the workflow rule creates a Review Call followup task to call the lead or client six months from now.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

### Record Type

The record type is an Activity record.

### Trigger Event

The trigger event is When Modified Record Saved.

### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE","Review Call") AND [<CallResult>]=LookupValue("OD_CALL_RESULT",  
"Stay In Touch") AND PRE('<CallResult>') IS NULL AND IIf(JoinFieldValue('<Contact>',  
[<PrimaryContactId>], '<DateofBirth>') IS NOT NULL, JulianDay(IIf(JulianDay(Mid(JoinFieldValue  
('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay  
(Today(), Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6) + ToChar  
(Today() + Duration("PLY"), 'YYYY'), Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>],  
'<DateofBirth>'), 1, 6) + ToChar(Today(), 'YYYY')) <= JulianDay(Today() + 7), [<PrimaryContactId>] <> "No  
Match Row Id")
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Review Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P6M"))
```

## Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Review Call")%%-%%JoinFieldValue('<Contact>', [<PrimaryContactId>], '<ContactFullName>')%%
```

# Followup Calls for Review Calls Where the Result Is Stay in Touch and the Birthday Is Not Within Six Months

This workflow rule is triggered when a producer calls a lead or client through a review call and then updates the Call Result field in the Task edit page to Stay in Touch. If the birthday of the lead or client more than six months from now, the workflow rule creates a review call followup task to call the lead or client six months from now.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

### Record Type

The record type is an Activity record.

## Trigger Event

The trigger event is When Modified Record Saved.

## Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<Type>]=LookupValue("TODO_TYPE","Review Call") AND [<CallResult>]=LookupValue("OD_CALL_RESULT",  
"Stay In Touch") AND PRE('<CallResult>') IS NULL AND JoinFieldValue('<Contact>', [<PrimaryContactId>],  
'<DateofBirth>') IS NOT NULL AND JulianDay(IIf(JulianDay(Mid(JoinFieldValue('<Contact>',  
[<PrimaryContactId>], '<DateofBirth>'), 1, 6)+ToChar(Today(), 'YYYY')<JulianDay(Today()), Mid  
(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6)+ToChar(Today()+Duration  
("P1Y"), 'YYYY'), Mid(JoinFieldValue('<Contact>', [<PrimaryContactId>], '<DateofBirth>'), 1, 6)+ToChar  
(Today(), 'YYYY'))>JulianDay(Today()+Duration("P6M"))
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Review Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")>="7"), IIf((IfNull(Mid  
(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")="7"), Today()+Duration("P6M")+2, Today()  
+Duration("P6M")+1), Today()+Duration("P6M"))
```

### Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Review Call")%%-%%JoinFieldValue('<Contact>', [<PrimaryContactId>],  
'<ContactFullName>')%%
```

## Workflow Rules for Scheduling Calls with Clients

When a lead decides to purchase a product, the producer converts the lead to a contact and sets the contact type field to Client. The producer must keep in regular touch with the new client by having review calls or birthday calls scheduled for the client. When the producer creates the contact record for the client, the producer sets the Call Frequency field to 1-2 Times/Year. When the Call Frequency field is updated, the following workflow rules create a Review Call or Birthday Call followup task to call the client either six months from now or one week before the birthday, whichever occurs first.

### Schedule Calls with Clients Where the Birthday Is Not in the Current Week and Is Within Six Months

This workflow rule is triggered when a producer updates the Call Frequency field on the contact (client) record to 1-2 Times/Year. If the birthday of the client is not within the current week and is not more than six months from now, the workflow rule creates a birthday call task to call the client a week before the birthday.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

### Workflow Rule Details

This topic describes the details of the workflow rule.

#### Record Type

The record type is a Contact record.

#### Trigger Event

The trigger event is When Modified Record Saved.

#### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<CallFrequency>] <> IfNull(PRE('<CallFrequency>'),"Invalid") AND [<CallFrequency>]=LookupValue  
( 'PROF_CALL_CLASS', '1-2 Times/Year') AND [<DateofBirth>] IS NOT NULL AND (JulianDay(If  
(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid(
```

```
[<DateofBirth>], 1, 6) + ToChar(Today()+Duration("P1Y"), 'YYYY'), Mid([<DateofBirth>], 1, 6)
+ ToChar(Today(), 'YYYY')) <= JulianDay(Today()+Duration("P6M")) AND (JulianDay(IIf(JulianDay
(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>],
1, 6) + ToChar(Today()+Duration("P1Y"), 'YYYY'), Mid([<DateofBirth>], 1, 6) + ToChar(Today(),
'YYYY')) > JulianDay(Today()+7))
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Birthday Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
Today()+JulianDay(Mid([<DateofBirth>], 1, 6)+IIf(JulianDay(Mid([<DateofBirth>], 1, 6)+ToChar(Today(),
'YYYY')) < JulianDay(Today()), ToChar(Today()+Duration("P1Y"), 'YYYY'), ToChar(Today(), 'YYYY'))
-JulianDay(Today())- (IIf(IfNull(Mid(1.0*(JulianDay(Mid([<DateofBirth>], 1, 6)+IIf(JulianDay(Mid
([<DateofBirth>], 1, 6)+ToChar(Today(), 'YYYY')) < JulianDay(Today()), ToChar(Today()+Duration
("P1Y"), 'YYYY'), ToChar(Today(), 'YYYY'))-7)/7, 8, 1), "0") >="7", (IIf(IfNull(Mid(1.0*(JulianDay(Mid
([<DateofBirth>], 1, 6)+IIf(JulianDay(Mid([<DateofBirth>], 1, 6)+ToChar(Today(), 'YYYY')) < JulianDay
(Today()), ToChar(Today()+Duration("P1Y"), 'YYYY'), ToChar(Today(), 'YYYY'))-7)/7, 8, 1), "0")="7", 5, 6)), 7))
```

### Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Birthday Call")%%-%%FieldValue('<ContactFullName>')%%
```

## Schedule Calls with Clients Where the Birthday Is Unknown, Is in the Current Week, or Is Not Within Six Months

This workflow rule is triggered when a producer updates the Call Frequency field on the contact (client) record to 1-2 Times/Year. If the birthday of the client is not known, or is within the current week, or is more than six months from now, the workflow rule creates a review call task to call the contact six months from now.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

### Workflow Rule Details

This topic describes the details of the workflow rule.

#### Record Type

The record type is a Contact record.

#### Trigger Event

The trigger event is When Modified Record Saved.

#### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<CallFrequency>] <> IfNull(PRE('<CallFrequency>'),'Invalid') AND [<CallFrequency>]=LookupValue  
( 'PROF_CALL_CLASS','1-2 Times/Year') AND IIf([<DateofBirth>] IS NOT NULL, ((JulianDay(IIf(JulianDay  
(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>],  
1, 6) + ToChar(Today()+Duration("PLY"), 'YYYY'), Mid([<DateofBirth>], 1, 6) + ToChar(Today(),  
'YYYY')) > JulianDay(Today()+Duration("P6M")))) OR (JulianDay(IIf(JulianDay(Mid([<DateofBirth>],  
1, 6) + ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>], 1, 6) + ToChar(Today()  
+Duration("PLY"), 'YYYY'), Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) <= JulianDay  
(Today()+7))), 1)
```

### Workflow Action Details

This topic describes the details of the workflow action.

## Action Type

The action type is Create Task.

## Task Type

The task type is a Review Call.

## Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P6M"))
```

## Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Review Call")%%- %%FieldValue('<ContactFullName>')%%
```

# Schedule Calls with Clients Where the Birthday Is Within Six Months and Is Not in the Current Week

This workflow rule is triggered when a producer updates the Call Frequency field on the contact (client) record to 1-2 Times/Year. If the birthday of the client is not more than six months from now and is not within the current week, the workflow rule creates a birthday call task to call the client one week before the birthday.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

### Record Type

The record type is a Contact record.

### Trigger Event

The trigger event is When New Record Saved.

### Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<CallFrequency>]=LookupValue('PROF_CALL_CLASS','1-2 Times/Year') AND [<DateofBirth>] IS NOT  
NULL AND (JulianDay(If(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY'))  
< JulianDay(Today()), Mid([<DateofBirth>], 1, 6) + ToChar(Today()+Duration("P1Y"), 'YYYY'),Mid  
([<DateofBirth>],1, 6) + ToChar(Today(), 'YYYY')) <= JulianDay(Today()+Duration("P6M")) AND  
(JulianDay(If(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay  
(Today()), Mid([<DateofBirth>], 1, 6) + ToChar(Today()+Duration("P1Y"), 'YYYY'),Mid(  
[<DateofBirth>],1, 6) + ToChar(Today(), 'YYYY')) > JulianDay(Today()+7))
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Birthday Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
Today()+JulianDay(Mid([<DateofBirth>],1,6)+IIf(JulianDay(Mid([<DateofBirth>],1,6)+ToChar(Today(),
'YYYY')) < JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY'))))
-JulianDay(Today())-(IIf(IfNull(Mid(1.0*(JulianDay(Mid([<DateofBirth>],1,6)+IIf(JulianDay(Mid(
[<DateofBirth>],1,6)+ToChar(Today(),'YYYY')) < JulianDay(Today()),ToChar(Today()+Duration("P1Y"),
'YYYY'),ToChar(Today(),'YYYY'))-7)/7,8,1),"0")>="7", (IIf(IfNull(Mid(1.0*(JulianDay(Mid(
[<DateofBirth>],1,6)+IIf(JulianDay(Mid([<DateofBirth>],1,6)+ToChar(Today(),'YYYY')) <
JulianDay(Today()),ToChar(Today()+Duration("P1Y"),'YYYY'),ToChar(Today(),'YYYY'))-7)/7,8,1),
"0")="7",5,6)),7))
```

## Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%LookupValue("TODO_TYPE", "Birthday Call")%% %%FieldValue('<ContactFullName>')%%
```

## Schedule Tasks for Calls to Clients where the Birthday is in the Current Week or is Not Within Six Months

The workflow rule described in this section is triggered when a producer updates the Call Frequency field on the contact (client) record to 1-2 Times/Year. If the birthday of the client is within the current week or is more than six months from now, the workflow rule creates a review call task to call the contact six months from now.

**Note:** The expressions in this topic might appear across several lines due to length. All expressions in this topic must be entered in Expression Builder as one line and cannot contain any spaces. Also, the language-independent field names and the field-name syntax used in the expressions in this topic are the field names and syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These expressions are still valid in Release 29 Service Pack 1 and later releases. However, starting with Release 29 Service Pack 1, Expression Builder uses language-independent field names and a field-name syntax that are different from the field names and the field-name syntax used in earlier releases. So, 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 this topic, and the fields will appear in the expression editor with the following syntax: [{FieldName}]. It is recommended that you always select the fields for your expressions from the list of fields in Expression Builder, so that the field names and the field syntax are always correct. For more information about Expression Builder, see *Oracle CRM On Demand Online Help*.

## Workflow Rule Details

This topic describes the details of the workflow rule.

## Record Type

The record type is a Contact record.

## Trigger Event

The trigger event is When New Record Saved.

## Rule Condition

The Workflow Rule Condition field contains the workflow rule condition.

Enter the following expression in the Workflow Rule Condition field:

```
[<CallFrequency>]=LookupValue('PROF_CALL_CLASS','1-2 Times/Year') AND IIf([<DateofBirth>] IS NOT NULL, ((JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>], 1, 6) + ToChar(Today()+Duration("P1Y"), 'YYYY'), Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) > JulianDay(Today()+Duration("P6M")) OR (JulianDay(IIf(JulianDay(Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) < JulianDay(Today()), Mid([<DateofBirth>], 1, 6) + ToChar(Today()+Duration("P1Y"), 'YYYY'), Mid([<DateofBirth>], 1, 6) + ToChar(Today(), 'YYYY')) <= JulianDay(Today()+7))), 1)
```

## Workflow Action Details

This topic describes the details of the workflow action.

### Action Type

The action type is Create Task.

### Task Type

The task type is a Review Call.

### Due Date

The Due Date field contains a numeric value that is calculated by adding the value in this field to the date on which the task is created.

Enter the following expression in the Due Date field:

```
IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")>="7"),IIf((IfNull(Mid(1.0 * JulianDay(Today()+Duration("P6M"))/7, 8, 1), "0")="7"),Today()+Duration("P6M")+2,Today()+Duration("P6M")+1),Today()+Duration("P6M"))
```

### Subject

The Subject field contains 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.

**CAUTION:** In the Subject field, three percent signs (%%%) are placed before and after the functions and field names. If you type a function or field name directly in the Subject 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 and must not be pasted into Expression Builder. When percent signs are pasted into Expression Builder, Expression Builder displays an internal error.

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

Enter the following expression in the Subject field:

```
%%%LookupValue("TODO_TYPE", "Review Call")%%% - %%%FieldValue('<ContactFullName>')%%%
```

