Oracle CRM On Demand

Configuration Guide for Oracle CRM On Demand Life Sciences Edition Release 43

August 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*.

1 What's New in This Release

What’s New in Configuration Guide for Oracle CRM On Demand Life Sciences Edition, Release 43

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

2 Getting Started

Getting Started

This chapter describes the initial tasks that must be completed before you can configure and start using Oracle CRM On Demand Life Sciences Edition. This chapter includes the following topics:

- *About This Guide*
- *About Provisioning Oracle CRM On Demand Life Sciences Edition*
- *Record Types for Oracle CRM On Demand Life Sciences Edition*
- *About Life Sciences Preferences*
- *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition*

About This Guide

This guide is for company administrators using Oracle CRM On Demand Life Sciences Edition. It describes the tasks that are performed to configure Oracle CRM On Demand Life Sciences Edition. This guide provides details of the suggested page layouts and roles that you can set up to support the management of life sciences information and the pharmaceutical sales process. Company administrators use Oracle CRM On Demand to manage the company profile, global defaults, users, access controls, data loads, and custom page layouts, in addition to other tasks.

The configuration settings in this guide are suggested settings for the Oracle CRM On Demand Life Sciences Edition. Your company requirements might differ from the suggested settings.

This guide also provides examples of tasks and processes that users perform in Oracle CRM On Demand Life Sciences Edition. For information about configuring and setting up the standard edition of Oracle CRM On Demand, see *Oracle CRM On Demand Online Help* .

About Oracle CRM On Demand Industry Editions

Oracle CRM On Demand Industry Editions provide capabilities for the following industries. These capabilities help customers to meet industry-specific business requirements.

- Automotive
- Financial services

  See *Configuration Guide for Oracle CRM On Demand Financial Services Edition* .
- High technology
- Life sciences

  See *Configuration Guide for Oracle CRM On Demand Life Sciences Edition* (this guide).

For customers to use Oracle CRM On Demand Industry Editions (for example, Oracle CRM On Demand Financial Services Edition or Oracle CRM On Demand Life Sciences Edition), the functionality that is specific to a particular industry such as financial services, life sciences, automotive, or high technology, must be provisioned. After the Oracle CRM On Demand Life Sciences Edition pages and the life sciences administrator role have been set up by the provisioning process, life sciences administrators can start to configure Oracle CRM On Demand Life Sciences Edition. For more information on provisioning, see *About Provisioning Oracle CRM On Demand Life Sciences Edition*.

About Oracle CRM On Demand Life Sciences Edition

Your company can customize the tasks and processes to support your business requirements. Using Oracle CRM On Demand Life Sciences Edition, you can manage the following:

- Account management
- Activity management (Contact Call and Account Call Activity)
- Business planning
- Contact management
- Event management
- Personalized content delivery
- Samples management

For more information about administering order and sample request management using Oracle CRM On Demand, see *Oracle CRM On Demand Online Help* .

About Provisioning Oracle CRM On Demand Life Sciences Edition

If your company plans to use Oracle CRM On Demand Life Sciences Edition, then your first task is to contact Customer Care and ask the agent to set up your company to use Oracle CRM On Demand Life Sciences Edition. The initial setup process, which is referred to as *provisioning*, makes available Web pages, features, and fields, which can differ from the standard edition of Oracle CRM On Demand, but are relevant to your business.

When Customer Care provisions Oracle CRM On Demand Life Sciences Edition for your company, Customer Care adds a number of life sciences record types to your Oracle CRM On Demand application. For more information about these life sciences record types, see *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition* and *Record Types for Oracle CRM On Demand Life Sciences Edition*.

Customer Care also creates the access profiles for Oracle CRM On Demand Life Sciences Edition and the life sciences administrator role, and assigns this role to your company administrator. This role gives company administrators the privileges and access options that they require to configure the Oracle CRM On Demand application, create other roles, and grant the same privileges and access options to other roles. The configuration tasks are described in the following chapters.

Customer Care can also set up other features in Oracle CRM On Demand Life Sciences Edition, including the following:

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

- How your company handles record locking for certain life sciences record types, to meet regulatory guidelines to enhance data integrity and data quality

Record Types for Oracle CRM On Demand Life Sciences Edition

In Oracle CRM On Demand Life Sciences Edition, the following record types for life sciences have preconfigured fields for use in life sciences industries. You configure these life sciences record types only if the record types are required for your company's specific requirements.

When Customer Care provisions Oracle CRM On Demand Life Sciences Edition for your company, Customer Care adds the following life sciences record types to your Oracle CRM On Demand application:

- Account
- Activity
- Allocation
- Business Plan
- Blocked Products
- Contact
- Contact Best Time
- Contact State License
- Event, and its child record, Invitee
- HCP Contact Allocation
- Inventory Audit Report
- Inventory Period
- Messaging Plan
- Messaging Plan Item
- Messaging Plan Item Relations
- Message Response
- Order
- Order Item
- Objective
- Product Indication
- Plan Accounts
- Plan Contact
- Plan Opportunity
- Sample Disclaimer, and its child record, Related Disclaimer
- Sample Inventory

- Sample Lot
- Sample Request
- Sample Request item
- Sample Transaction
- Signature
- Smart Call
- Solution
- Transaction Item

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

About Life Sciences Preferences

You can set up the following preferences on the Life Sciences Related Preferences page in Oracle CRM On Demand Life Sciences Edition:

- Life Sciences Preference:
  - Generate Call Activity History
  - Allow Submission of Future Calls & Sample Transactions
- Define Sample Related Preferences:
  - Number of Times a Contact Can Be Sampled
  - Enable Filtering of Product Selection by Sales Rep Allocation
  - Enable Contact State License Validation
  - Enable Signature Validation

For detailed information on how to set these preferences, see *Oracle CRM On Demand Online Help* .

Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition

To configure Oracle CRM On Demand Life Sciences Edition, perform the following tasks:

1. If you have not already done so, then contact Customer Care, and ask the agent to provision your Oracle CRM On Demand application to use Oracle CRM On Demand Life Sciences Edition.
2. Sign in to Oracle CRM On Demand.
3. Configure the field setup.

   For more information, see *Configuring the Fields for Oracle CRM On Demand Life Sciences Edition*.
4. Set up the page layouts for each role that you plan to create for Oracle CRM On Demand Life Sciences Edition. This includes page layouts for structured product messaging (SPM), if required.

For more information, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition* and *Setting Up Structured Product Messaging Dynamic Page Layouts*.

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

   For more information, see *Setting Up Access Profiles for Life Sciences Roles*.
6. Select the order usage option for Oracle CRM On Demand Life Sciences Edition.

   For more information, see *Selecting the Order Usage Option*.
7. Create roles for Oracle CRM On Demand Life Sciences Edition.

   For more information, see *Creating Life Sciences Roles*.
8. Configure record locking for Oracle CRM On Demand Life Sciences Edition.

   For more information, see *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.
9. If your company plans to use samples management functionality, then load the seed data for the following:

   - Allocation
   - HCP Contact Allocation
   - Inventory Period
   - Product
   - Product Categories
   - Sample Inventory
   - Sample Lot
   - Users

   For more information, see *Data Loading*.

3 Configuring Required Fields

Configuring Required Fields

This chapter describes how to configure the required fields before you can start using Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

- *Configuring the Fields for Oracle CRM On Demand Life Sciences Edition*
- *About Field Setup*
    - *About Sample Transaction Field Setup*
    - *About Account Contact Field Setup*
    - *About Call Type Picklist Setup for Account and Contact*
    - *About Type Picklist Setup for Order and Sample Requests*
    - *About Required Fields for Account Call and Contact Call*

Configuring the Fields for Oracle CRM On Demand Life Sciences Edition

Use the following procedure to configure the fields for Oracle CRM On Demand Life Sciences Edition. This task is a step in *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition*.

To configure the fields for Oracle CRM On Demand Life Sciences Edition

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

   For information about configuring fields for Oracle CRM On Demand Life Sciences Edition, including custom fields, see *About Field Setup*:

About Field Setup

The following topics provide information about configuring fields, including custom fields, for Oracle CRM On Demand Life Sciences Edition:

- *About Sample Transaction Field Setup*

- *About Account Contact Field Setup*
- *About Call Type Picklist Setup for Account and Contact*
- *About Type Picklist Setup for Order and Sample Requests*
- *About Required Fields for Account Call and Contact Call*

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

About Sample Transaction Field Setup

For Sample Transaction Field Setup, it is recommended that you do not customize or change the following order of the Type picklist because the cascading picklist functionality might be affected:

- Transfer Out
- Samples Lost
- Inventory Adjustment
- Disbursement
- Transfer In

About Account Contact Field Setup

For Account Contact Field Setup, any custom fields that you create must not be required for the Account Contact record type; that is, the *Required* checkbox must not be selected.

About Call Type Picklist Setup for Account and Contact

Because of specialized coding, customizing the Call Type field in an Activity record is not supported. The predefined Call Type values are Attendee, Account, Professional, and General, and they must not to be altered.

About Type Picklist Setup for Order and Sample Requests

It is recommended that you do not alter the Type field picklist values on the Order and Sample Request record types.

About Required Fields for Account Call and Contact Call

If you are using the Auto Call functionality, then the page layout for Account Call and the page layout for Contact Call must not contain any additional required fields. The fields that are currently required for Account Call and Contact Call are automatically seeded in the Auto Call process. Do not add any additional required fields.

4 Setting Up Page Layouts

Setting Up Page Layouts

This chapter describes how to set up page layouts for life sciences record types in Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

- *Page Layouts in Oracle CRM On Demand Life Sciences Edition*
- *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*
- *Page Layout Configurations for the LS Field Sales Rep Role*
- *Setting Up Structured Product Messaging Dynamic Page Layouts*

Page Layouts in Oracle CRM On Demand Life Sciences Edition

It is recommended that you set up page layouts for each role that you intend to create in Oracle CRM On Demand Life Sciences 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* .

Generic Page Layouts

In Oracle CRM On Demand Life Sciences Edition, the following record types have preconfigured fields that can be used in all industries (life sciences, financial services, automotive, and high technology) and have many of the page layouts created for you:

- Blocked Products
- Contact Best Time
- Contact State License
- Inventory Audit Report
- Messaging Plan Item
- Messaging Plan Item Relations
- Message Response
- Plan Accounts
- Plan Contact

- Plan Opportunity
- Product Indication
- Sample Disclaimer

  The generic Sample Disclaimer page layout applies only to Global sample disclaimers. For Multilingual sample disclaimers, see *Custom Page Layouts*.
- Signature
- Smart Call

Custom Page Layouts

It is recommended that company administrators set up custom page layouts for the following record types for each role in Oracle CRM On Demand Life Sciences Edition:

- Account (Account, Account Relationship, Account Contact)
- Activity (Account Call, Contact Call, Smart Call, Attendee Call)
- Allocation
- Business Plan
- Call Product Detail
- Contact (Contact, Contact Relationship)
- Event
- HCP Contact Allocation
- Inventory Period
- Invitee
- Messaging Plan
- Order
- Order Item
- Objective
- Sample Disclaimer

  The custom Sample Disclaimer page layout applies only to multilingual sample disclaimers. For global sample disclaimers, see *Generic Page Layouts*.
- Sample Inventory
- Sample Lot
- Sample Request
- Sample Request Item
- Sample Transaction
- Solution
- Transaction Item

Dynamic Page Layouts

Administrators can set up dynamic page layouts for the following record types for each role in Oracle CRM On Demand Life Sciences Edition:

- Activity
- Allocation
- Business Plan
- Contact
- Event
- Inventory Audit Report
- Message Response
- Messaging Plan
- Messaging Plan Item
- Messaging Plan Item Relations
- Objective
- Sample Transaction
- Solution

Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition

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 make available the related information in the page layout.

Complete the steps in the following procedure for each page layout that you want to set up in Oracle CRM On Demand Life Sciences Edition. The information cross referenced in this procedure shows the details of the custom page layouts and related information sections that company administrators set up for the Oracle CRM On Demand Life Sciences Edition.

This task is a step in *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition*.

To set up a page layout for Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Application Customization.
2. In the Record Type Setup section, click the link for the required record type, for example, click the Account record type.
3. In the Page Layout Management section, click the link for the required page layout type, for example, click the link for Account Page Layout.
4. Perform the following steps:

a. On the Record Type Page Layout page, click Copy (the 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.

   Record Type is a placeholder for the name of the Page Layout page.
b. In Step 1 of the Page Layout wizard, enter a name for the layout and (optionally) a description, for example, enter LS Account Page Layout.
c. Click Finish to save the layout.

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

For information about the page layouts that can be customized for the LS Field Sales Rep role, see *Page Layouts for the LS Field Sales Rep Role*.

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.

   Record Type is a placeholder for the name of the Page Layout page.
6. In the Section Names Setup page, enter the labels for any new sections that you want to set up on the page layout or edit the display name of the default sections as required, then click Save.

   For information about the page sections in the custom page layouts for the LS Field Sales Rep role, see *Page Sections for the LS Field Sales Rep Role Page Layouts*.
7. On the Record Type Page Layout page, click the Edit link next to the layout that you want to configure.

   Record Type is a placeholder for the name of the Page Layout page.
8. In the Page Layout wizard, go to Step 2 (Field Setup), and specify the field setup for the page layout.

   For each field, select the Required or Read-Only check box, as necessary to support your business processes. For information about the field setup in the custom page layouts for the LS Field Sales Rep role, see *Field Setup and Layout for the LS Field Sales Rep Role Page Layouts*.
9. In the Page Layout wizard, go to Step 3 (Field Layout), and configure the field layout for the page.

   Click the arrows to add fields to the various page sections, and remove any fields that are not required, by moving them from the page sections to the Available Fields list. For information about the field layout in the custom page layouts for the LS Field Sales Rep role, see *Field Setup and Layout for the LS Field Sales Rep Role Page Layouts*.
10. In the Page Layout wizard, go to Step 4 (Related Information), and configure the related information that is available on the page.

    Click the arrows to move the Related Information items to the Displayed Information or Available Information sections, as required. For information about the related information sections in the custom page layouts for the LS Field Sales Rep role, see *Related Information Sections for the LS Field Sales Rep Role Page Layouts*.
11. Click Finish.

Page Layout Configurations for the LS Field Sales Rep Role

This topic describes the recommended page layout modifications that life sciences administrators configure for the LS Field Sales Rep role. It contains the following information:

- *Page Layouts for the LS Field Sales Rep Role*
- *Page Sections for the LS Field Sales Rep Role Page Layouts*
- *Field Setup and Layout for the LS Field Sales Rep Role Page Layouts*
- *Related Information Sections for the LS Field Sales Rep Role Page Layouts*

Page Layouts for the LS Field Sales Rep Role

The following table shows examples of the page layouts that you can customize to support the LS Field Sales Rep role. Recommendations include, for example, that you copy the Account Page Standard Layout (belonging to the Account record type) and rename it to LS Account Page Layout. For instructions on configuring page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*.

Record Type	Page Layout Type	Copy Existing Layout	Rename to
Account	Account Page Layout	Account Page Standard Layout	LS Account Page Layout
Account	Account Relationship Page Layout	Account Relationship Page Standard Layout	LS Account Relationship Page Layout
Account	Account Contact Page Layout	Account Contact Page Standard Layout	LS Account Contact Page Layout
Activity	Account Call Page Layout	Call Page Standard Layout	LS Account Call Page Layout
Activity	Contact Call Page Layout	Call Page Standard Layout	LS Contact Call Page Layout
Activity	Smart Call Page Layout	Call Page Standard Layout	LS Smart Call Page Layout
Activity	Attendee Call Page Layout	Call Page Standard Layout	LS Attendee Call Page Layout
Allocation	Allocation Page Layout	Allocation Page Standard Layout	LS Allocation Page Layout
Business Plan	Business Plan Page Layout	Business Plan Page Standard Layout	LS Business Plan Page Layout
Call Product Detail	Call Product Detail Page Layout	Call Product Detail Page Standard Layout	LS Call Product Detail Page Standard Layout

Record Type	Page Layout Type	Copy Existing Layout	Rename to
Note: Call Product Detail is a child record of the Activity record.			
Contact	Contact Page Layout	Contact Page Standard Layout	LS Contact Page Layout
Contact	Contact Relationship Page Layout	Contact Relationship Page Standard Layout	LS Contact Relationship Page Layout
Event	Event Page Layout	Event Page Standard Layout	LS Event Page Layout
HCP Contact Allocation	HCP Contact Allocation Page Layout	HCP Contact Allocation Page Standard Layout	LS HCP Contact Allocation Page Layout
Inventory Period	Inventory Period Page Layout	Inventory Period Page Standard Layout	LS Inventory Period Page Layout
Invitee	Invitee Page Layout	Invitee Page Standard Page Layout	LS Invitee Page Layout
Messaging Plan	Messaging Plan Page Layout	Messaging Plan Page Standard Layout	LS Messaging Plan Page Layout
	Messaging Plan Call Objective Plan Page Layout	Messaging Plan Page Standard Layout	LS Messaging Plan Call Objective Plan Page Layout
	Note: The previous layout applies to Structured Product Messaging layout. For more information, see *Setting Up Structured Product Messaging Dynamic Page Layouts*.		
Messaging Plan Item	Messaging Plan Item Page Layout	Messaging Plan Item Page Standard Layout	LS Messaging Plan Item Page Layout
	Messaging Plan Item Call Objective Page Layout	Messaging Plan Item Page Standard Layout	LS Messaging Plan Item Call Objective Page Layout
	Note: The previous layout applies to Structured Product Messaging. For more information, see *Setting Up Structured Product Messaging Dynamic Page Layouts*.		
Messaging Plan Item Relations	Messaging Plan Item Relations Page Layout	Messaging Plan Item Relations Page Standard Layout	LS Messaging Plan Item Relations Page Layout
	Messaging Plan Item Relations Next Call Objective Page Layout	Messaging Plan Item Relations Page Standard Layout	LS Messaging Plan Item Relations Next Call Objective Page Layout

Record Type	Page Layout Type	Copy Existing Layout	Rename to
	Note: The previous layout applies to Structured Product Messaging. For more information, see *Setting Up Structured Product Messaging Dynamic Page Layouts*.		
Message Response	Message Response Page Layout	Message Response Page Standard Layout	LS Message Response Page Layout
	Message Response Outcome Page Layout	Message Response Page Standard Layout	LS Message Response Outcome Page Layout
	Note: The previous layout applies to Structured Product Messaging. For more information, see *Setting Up Structured Product Messaging Dynamic Page Layouts*.		
Objective	Objective Page Layout	Objective Page Standard Layout	LS Objective Page Layout
Order	Order Page Layout	Order Page Standard Layout	LS Order Page Layout
Order Item	Order Item Page Layout	Order Item Page Standard Layout	LS Order Item Page Layout
Product Indication	Product Indication Page Layout	Product Indication Page Standard Layout	LS Product Indication Page Layout
Sample Disclaimer	Sample Disclaimer Page Layout	Sample Disclaimer Page Standard Layout	LS Sample Disclaimer Page Layout
Sample Lot	Sample Lot Page Layout	Sample Lot Page Standard Layout	LS Sample Lot Page Layout
Sample Request	Sample Request Page Layout	Sample Request Page Standard Layout	LS Sample Request Page Layout
Sample Request Item	Sample Request Item Page Layout	Sample Request Item Page Standard Layout	LS Sample Request Item Page Layout
Sample Transaction	Sample Transaction Page Layout	Sample Transaction Page Standard Layout	LS Sample Transaction Page Layout
Solution	Solution Page Layout	Solution Page Standard Layout	LS Solution Page Layout
Transaction Item	Transaction Item Page Layout	Transaction Item Page Standard Layout	LS Transaction Item Page Layout

Page Sections for the LS Field Sales Rep Role Page Layouts

Rename the page sections for the custom page layouts that support the LS Field Sales Rep role only if your company has a requirement to change the section names. For instructions on configuring page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*.

Field Setup and Layout for the LS Field Sales Rep Role Page Layouts

The following table shows the field setup and layout that company administrators configure for the custom page layouts that support the LS Field Sales Rep role. Recommendations include, for example, that you set up the (required, read-only, or optional) field layout as described in the following for the following page sections in the LS Account Page Layout:

- Key Account Information
- Account Sales Information
- Additional Information

For instructions on configuring page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*.

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Account	LS Account Page Layout	**Key Account Information**	
		Account Name	Required
		Location	Optional
		Parent Account	Optional
		Main Phone #	Optional
		Main Fax #	Optional
		Web Site	Optional
		Account Currency	Optional
		Account Sales Information	
		Account Type	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Priority	Optional
		Industry	Optional
		Public Company	Optional
		Region	Optional
		Reference	Optional
		Reference as of	Optional
		Annual Revenues	Optional
		Number of Employees	Optional
		Primary Contact	Optional
		Additional Information	
		Billing	Optional
		Owner	Optional
		Book	Optional
		Shipping	Optional
		Modified External	Read-Only
		Created External	Read-Only
Account	LS Account Contact Page Layout	Contact Name	Required
		Primary Contact	Read-Only
		Last Name	Read-Only
		First Name	Read-Only

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Job Title	Read-Only
		Contact Role	Read-Only
		Work Phone #	Read-Only
		Email	Read-Only
Account	LS Account Relationship Page Layout	**Key Relationship Information**	
		Related Account	Required
		Role	Required
		Reverse Role	Required
		Relationship Detail Information	
		Start Date	Optional
		End Date	Optional
		Status	Optional
		Comments	Optional
CAUTION: This caution applies to the following page layouts for the Activity record type: LS Account Call Page Layout, LS Contact Call Page Layout, LS Smart Call Page Layout, and LS Attendee Call Page Layout. Although it is possible to add to, or edit the default values for the Status picklist field for the Activity record type if your role includes the Customize Application - Edit Activity 'Status' Picklist and the Customize Application privileges, changing the default values is not recommended for Oracle CRM On Demand Life Sciences Edition. Customization of the Status field will produce unwanted results for activity processing. Oracle CRM On Demand Life Sciences Edition specifically looks for the Completed, Submitting, Submitted, or Planned field values when it processes activities. Deactivating these status values or replacing them with custom values will alter activity processing in the Oracle CRM On Demand application, and this processing will not work as documented.			
Activity	LS Account Call Page Layout	**Key Call Information**	
		Subject	Required
		Primary Contact	Optional
		Account	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Address	Optional
		Smart Call	Optional
		Status	Optional
		Activity Currency	Optional
		Objective	Optional
		Start Time	Required
		Duration	Read-Only
		End Time	Required
		Type	Required
		Ref #	Optional
		Additional Information	
		Cost	Optional
		Owner	Required
		Book	Optional
		Modified External	Read-Only
		Paper Sign	Optional
		Private	Optional
		Created External	Read-Only
Activity	LS Contact Call Page Layout	**Key Call Information**	
		Subject	Required
		Primary Contact	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Account	Optional
		Address	Optional
		Smart Call	Optional
		Status	Optional
		Activity Currency	Optional
		Objective	Optional
		Start Time	Required
		Duration	Read-Only
		End Time	Required
		Type	Required
		Ref #	Optional
		Additional Information	
		Cost	Optional
		Owner	Required
		Book	Required
		Modified External	Read-Only
		Paper Sign	Optional
		Private	Optional
		Created External	Read-Only
Activity	LS Smart Call Page Layout	**Key Smart Call Information**	

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Subject	Required
		Primary Contact	Optional
		Account	Optional
		Address	Optional
		Smart Call	Optional
		Status	Optional
		Activity Currency	Optional
		Objective	Optional
		Start Time	Required
		Duration	Read-Only
		End Time	Required
		Type	Required
		Ref #	Optional
		Additional Information	
		Cost	Optional
		Owner	Required
		Book	Optional
		Modified External	Read-Only
		Paper Sign	Optional
		Private	Optional
		Created External	Read-Only

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Activity	LS Attendee Call Page Layout	**Key Call Information**	
		Subject	Required
		Primary Contact	Required
		Account	Read-Only
		Address	Optional
		Smart Call	Optional
		Status	Optional
		Activity Currency	Optional
		Objective	Optional
		Start Time	Required
		End Time	Required
		Duration	Read-Only
		Type	Required
		Ref #	Optional
		Additional Information	
		Owner	Required
		Book	Optional
		Paper Sign	Optional
		Private	Optional
Allocation	LS Allocation Page Layout	**Key Allocation Information**	

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Allocation Type	Required
		Active	Read-Only
		Owner	Required
		Sample	Required
		Max Qty	Optional
		Allocation Qty	Optional
		Max Qty per Customer	Optional
		Sample: Description	Read-Only
		Id	Read-Only
		Start Date	Required
		End Date	Optional
		Owner: First Name	Read-Only
		Owner: Last Name	Read-Only
		Stop Sampling	Optional
		Order By	Optional
		User Detail	Read-Only
		Remaining Qty	Optional
		Distributed Qty	Optional
Business Plan	LS Business Plan Page Layout	**Key Plan Information**	
		Plan Name	Required
		Period	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Period: Start Date	Read-Only
		Period: End Date	Read-Only
		Type	Required
		Status	Required
		Owner	Optional
		Book	Optional
		Description	Optional
		Product Name	Optional
		Plan Revenue	Optional
		Currency	Optional
		Exchange Date	Optional
		SWOT Analysis	
		Strengths	Optional
		Weaknesses	Optional
		Opportunities	Optional
		Threats	Optional
Call Product Detail **Note:** Call Product Detail is a child record of the Activity record.	LS Call Product Detail Page Layout	**Key Product Detailed Information**	
		Product Category	Read-Only
		Product	Required
		Priority	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Indication	Optional
		Issues	Optional
		Indication Name	Optional
		Primary Message Response, which you can rename to Primary Outcome	Read-Only
		Primary Message Plan Item, which you can rename to Primary Call Objective	Read-Only
		Primary Messaging Plan Relations, which you can rename to Primary Next Call Objective	Read-Only
		Additional Information	
		Created By	Read-Only
		Modified By	Read-Only
Contact	LS Contact Page Layout	**Key Contact Information**	
		Mr./Ms.	Optional
		First Name	Required
		Middle Name	Optional
		Last Name	Required
		Account	Optional
		Time Zone	Optional
		Work Phone #	Optional
		Work Fax #	Optional
		Cellular Phone #	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Email	Optional
		Job Title	Optional
		Contact Detail Information	
		Contact Type	Optional
		Department	Optional
		Manager	Optional
		Lead Source	Optional
		Contact Currency	Optional
		Assistant name	Optional
		Assistant Phone #	Optional
		Private	Optional
		Never Email	Optional
		Blocked Reason Code	Read-Only
		Additional Information	
		Account	Optional
		Owner	Optional
		Book	Optional
		Contact	Optional
		Modified External	Read-Only
		Created External	Read-Only

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Contact	LS Contact Relationship Page Layout	**Key Contact Relationship Information**	
		Related Contact	Required
		Role	Required
		Reverse Role	Required
		Relationship Detail Information	
		Start Date	Optional
		End Date	Optional
		Status	Optional
		Description	Optional
Event	LS Event Page Layout	**Event Detail Information**	
		Name	Required
		Location	Optional
		Start Date	Required
		End Date	Required
		Confirm Date	Optional
		Status	Optional
		Type	Optional
		Budget	Optional
		Max Attendees	Optional
		Product	Optional
		Product Category	Optional

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Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		CME Credit	Optional
		Event Objective	Required
		Description	Optional
		Session Details	Optional
		Additional Information	
		Owner	Optional
		Book	Optional
		Owner Full Name	Optional
		Modified	Read-Only
HCP Contact Allocation	LS HCP Contact Allocation Page Layout	HCP Contact Allocation ID	Read-Only
		Type	Required
		Contact Name	Required
		Product Name: Description	Required
		Allocation Qty	Required
		Qty Distributed	Optional
		Qty Remaining	Optional
		Start Date	Required
		End Date	Optional
Inventory Period	LS Inventory Period Page Layout	**Inventory Period Information**	
		Start Date	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		End Date	Optional
		Active	Required
		Owner	Required
		Created	Read-Only
		Modified	Read-Only
		Inventory Period Misc Info	
		Reconciled	Required
Invitee	LS Invitee Page Layout	**Key Invitee Information**	
		Contact Name	Required
		YTD Sales	Optional
		Session Detail	Optional
		Account	Optional
		Type	Optional
		Comments	Optional
		Invitee Status	Required
		Signed Status	Read-Only
		Additional Information	
		Created	Read-Only
		Modified External	Read-Only
Messaging Plan	LS Messaging Plan Page Layout	**Key Messaging Plan Information**	
		Name	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Type	Required
		Product	Required
		Status	Required
		Verify	Read-Only
		Code	Optional
		Segment	Optional
		Owner	Required
		Start Date	Optional
		Expiration Date	Optional
		Release Date	Optional
		Disclosure Mandatory	Required
		Enable Followup	Required
		Lock Sequence	Required
		Product Indication	Optional
		Additional Messaging Plan Information	
		Audience	Optional
		Comment	Optional
		Description	Optional
		The following fields are used with the Oracle CRM On Demand Disconnected Mobile Sales application.	
		Disable Navigation	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Disable Response	Optional
		Default Menu Bar Control	Optional
Messaging Plan Item	LS Messaging Plan Item Page Layout	**Key Messaging Plan Item Information**	
		Sequence Number	Required
		Name	Optional
		Display Name	Optional
		Solution Name	Required
		Solution Name: Verification Status	Read-Only
		Solution Name: Release Date	Read-Only
		Solution Name: Expiration Date	Read-Only
		Currency	Read-Only
		Owner	Optional
		Disclosure Message	Required
		Type	Optional
		Rating	Optional
		Parent Message Plan	Required
		Status	Optional
		Description	Optional
		Id	Read-Only
		Product Indication	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Disable Preload	Required
		Additional Messaging Plan Item Information	
		Synopsis	
		Speaker Notes	
		Audience	
		Created By	Read-Only
		Created	Read-Only
Note: If Solution is not a required field in your page layout, then the Messaging Plan Item name defaults to the parent Messaging Plan name plus the Messaging Plan Item sequence number. For example, if you have a parent Messaging Plan called DrugABC Product Launch with four related Messaging Plan Items, then the names of the Messaging Plan Items are DrugABC Product Launch 1, DrugABC Product Launch 2, and so on. That is, the Messaging Plan Item name is a concatenation of the parent Messaging Plan name and the sequence number for the Messaging Plan Item.			
Messaging Plan Item Relations	LS Messaging Plan Item Relations Page Layout	**Key Messaging Plan Item Relations Information**	
		Name	Required
		Display Name	Optional
		Parent MP Item	Required
		Description	Optional
		Type	Optional
		Solution Name	Required
		Synopsis	Optional
Message Response	LS Message Response Page Layout	**Key Message Response Information**	
		Name	Required
		Message Plan	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Sequence	Required
		Message Plan Item	Optional
		Solution	Required
		Response	Optional
		Notes	Optional
		Section	Optional
		Start Time	Optional
		End Time	Optional
		Duration	Read-Only
		Followup	Optional
		Account	Optional
		Account: External Unique ID	Read-Only
		Account: Integration ID	Read-Only
		Profile Information	
		Id	Read-Only
		Type	Optional
Objective	LS Objective Page Layout	**Key Objective Information**	
		Objective Name	Required
		Plan Name	Optional
		Type	Required
		Status	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Period	Read-Only
		Period: Start Date	Read-Only
		Period: End Date	Read-Only
		Account Name	Optional
		Contact Name	Optional
		Product Name	Optional
		Target	
		Objective Revenue	Optional
		Currency	Optional
		Exchange Date	Optional
		Target Audience	Optional
		Objective Target	Optional
		Objective Units	Optional
		Additional Information	
		Description	Optional
		Owner	Optional
Order	LS Order Page Layout	**Key Order Information**	
		Order Number	Read-Only
		Account	Required
		Opportunity	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Contact	Required
		Order Created	Read-Only
		Order Creation Status	Read-Only
		External Unique Id	Read-Only
		Shipping Address	Required
		Billing Address	Optional
		Order Status	Read-Only
		Type	Optional
		Order Integration Message	Optional
		Price List	Optional
		Book	Optional
		Additional Information	
		Owner	Read-Only
		Description	Optional
		Created	Optional
		Modified	Optional
Order Item	LS Order Item Page Layout	**Key Order Item Information**	
		Order Item Number	Read-Only
		Currency	Optional
		Product	Required
		Quantity	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Order	Read-Only
		Additional Information	
		Created: Date	Read-Only
		Modified: Date	Read-Only
Product Indication	LS Product Indication Page Layout	**Key Product Indication Information**	
		Indication Name	Required
		Product Indication Name	Read-Only
		Product	Required
		Description	
		Product: Product Category	
Sample Disclaimer	LS Sample Disclaimer Page Layout	**Key Disclaimer Information**	
		Disclaimer Text	Required if Record type is set to Global. If not, then the global disclaimer will fail to activate.
		Start Date	Read-Only
		End Date	Read-Only
		Type	Required (Global or Multilingual)
		Country	Required (if Type is set to Multilingual)
		Default Language	Required (if Type is set to Multilingual)
		Additional Information	
		Comments	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Created	Read-Only
		Modified	Read-Only
Sample Inventory	LS Sample Inventory Page Layout	**Key Inventory Information**	
		Sample	Required
		Lot #	Optional
		Opening Balance	Required
		Last Physical Count	Read-Only
		Physical Count	Optional
		Difference	Read-Only
		Lot #: Expiration Date	Read-Only
		Lot #: CutOff Date	Read-Only
		Created	Read-Only
		Modified	Read-Only
Sample Lot	LS Sample Lot Page Layout	**Key Lot Information**	
		Lot #	Required
		Sample	Required
		Start Date	Optional
		Expiration Date	Required
		Short Days	Optional
		CutOff Date	Read-Only

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		CutOff_ Date	Read-Only
		Note: The CutOff Date field is the text version of the CutOff_Date field. Use the CutOff_Date field, if you require date processing or parsing in your application, for example, in the Oracle CRM On Demand Disconnected Mobile Sales application.	
		Status	Read-Only
		Inventory By Lot	Optional
		Sample: Part #	Read-Only
		Created	Read-Only
		Modified	Read-Only
		Orderable	Required
		Description	
		Owner	Required
		Description	Optional
Sample Request	LS Sample Request Page Layout	**Key Sample Request Information**	
		Order Number	Optional
		Account	Required
		Contact	Required
		Note: Only one of Account or Contact is required, but not both.	
		Shipping Address	Required
		Order Created	Read-Only
		Status	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Type	Optional
		Book	Optional
		Additional Information	
		Owner	Read-Only
		Created	Read-Only
		Description	Optional
		Modified	Read-Only
Sample Request Item	LS Sample Request Item Page Layout	**Key Sample Request Item Information**	
		Order Item Number	Read-Only
		Quantity	Required
		Product	Required
		Order	Required
		Status	Required
		Additional Information	
		Created: Date	Read-Only
		Modified: Date	Read-Only
Sample Transaction	LS Sample Transaction Page Layout	**Key Transaction Information**	
		Name	Read-Only
		Date	Required
		Type	Required
		Status	Read-Only

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Expected Delivery Date	Optional
		Tracking #	Optional
		# of Packages Sent	Optional
		Transfer To	Optional
		Transfer From	Read-Only
		Inventory Period: Start Date	Read-Only
		Inventory Period: End Date	Read-Only
		Adjustment Reason	Optional
		Comments	Optional
		Activity: Id	Read-Only
Solution	LS Solution Page Layout	**Solution Detail Information**	
		Solution ID	Read-Only
		Title	Required
		Status	Optional
		Solution Currency	Optional
		Published	Optional
		Solution Rating	Read-Only
		Created External	Read-Only
		Modified External	Read-Only
		Additional Information	

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Expiration Date	Optional
		Number of Ratings	Read-Only
		PCD Attainment Type	Optional
		Related Thumbnail Image	Optional
		Release Date	Optional
		Verification Status	Optional
		Legal Approval	Optional
		Marketing Approval	Optional
		Multi-file Asset	Optional
Transaction Item	LS Transaction Item Page Layout	**Key Transaction Item Information**	
		Line Number	Required
		Sample	Required
		Lot#	Optional
		Quantity	Required
		Shipped Quantity	Optional
		Transaction #	Required
		Owner	Optional

Related Information Sections for the LS Field Sales Rep Role Page Layouts

The following table shows the related information sections, specific to life sciences, that company administrators make available (that is, move to the Displayed Information section) in the custom page layouts that support the LS Field Sales Rep role. Other general information sections (such as Campaigns, Leads, Opportunities, and Contacts), which are relevant to all industry editions, must also be made available.

For instructions on configuring page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*.

Record Type	Page Layout	Displayed Information
Account	LS Account Page Layout	Account Event
		Account Relationships
		Account Team
		Account Survey
		Addresses
		Calls
		Contacts
		Objectives
		Orders
		Plan Accounts
		Revenues
Activity	LS Account Call Page Layout	Activity Assessments
		Attendee Calls or Contacts

Record Type	Page Layout	Displayed Information
	Note: It is recommended that you display Attendee Call instead of Contacts (but not both) on the LS Account Call Page. It is also recommended that you display either Available Products for Detailing or Products Detailed, either Available Promotional Items for Drop or Promotional Items, and either Available Samples for Drop or Samples Dropped. Each pair of related information sections contains similar information, but you can display all six sections if required and in any combination.	
		Available Message Plans
		Available Products for Detailing or Products Detailed **Note:** For additional considerations on Products Detailed, see *Call Product Detail Page Layout*.
		Available Promotional Items for Drop or Promotional Items
		Available Samples for Drop or Samples Dropped
		Contacts
		Message Responses
		Sample Requests
		Sample Transactions
		Signature
		Solutions
		Custom Objects 01-03
Activity	LS Contact Call Page Layout **Note:** It is recommended that you display either Available Products for Detailing or Products Detailed, either Available Promotional Items for Drop or Promotional Items, and either Available Samples for Drop or Samples Dropped. Each pair of related information sections contains similar information, but you can display all six sections if required and in any combination.	Activity Assessments
		Available Message Plans
		Available Products for Detailing or Products Detailed **Note:** For additional considerations on Products Detailed, see *Call Product Detail Page Layout*.
		Available Promotional Items for Drop or Promotional Items

Record Type	Page Layout	Displayed Information
		Available Samples for Drop or Samples Dropped
		Contacts
		Message Responses
		Sample Requests
		Sample Transactions
		Signature
		Solutions
		Contact Best Times (read-only)
		Custom Objects 01-03
Activity	LS Attendee Call Page Layout **Note:** It is recommended that you display either Available Products for Detailing or Products Detailed, either Available Promotional Items for Drop or Promotional Items, and either Available Samples for Drop or Samples Dropped. Each pair of related information sections contain similar information, but you can display all six sections if required and in any combination.	Available Products for Detailing or Products Detailed For additional considerations on Products Detailed, see *Call Product Detail Page Layout*.
		Available Promotional Items for Drop or Promotional Items
		Available Samples for Drop or Samples Dropped
		Message Responses
		Sample Requests
		Sample Transactions
		Signature
		Custom Objects 01-03
Activity	LS Smart Call Page Layout	Products Details

Record Type	Page Layout	Displayed Information
		Promotional Items
		Samples Dropped
Allocation	LS Allocation Page Layout	Audit Trail
		Books
Business Plan	LS Business Plan Page Layout	Activities
		Books
		Business Plans
		Business Plan Assessment
		Business Plan Team
		Objectives
		Plan Accounts
		Plan Contacts
		Plan Opportunities
Contact	LS Contact Page Layout	Accounts
		Addresses
		Calls
		Contact Best Times
		Contact Relationships
		Contact State Licenses
		Contact Team
		HCP Contact Allocations

Record Type	Page Layout	Displayed Information
		Event
		Orders
		Objectives
		Plan Contacts
		Blocked Products
		Referrals
		Revenues
		Signature
Event	LS Event Page Layout	Account Event
		Books
		Completed Activities
		Custom Objects 01-40
		Invitees
		Open Activities
		Event Team
Inventory Period	LS Inventory Period Page Layout	Books
		Custom Objects 01-40
		Inventory Audit Reports
		Sample Inventory
		Sample Transactions
Invitee	LS Invitee Page Layout	Custom Objects 01-40

Record Type	Page Layout	Displayed Information
Messaging Plan	LS Messaging Plan Page Layout	Books
		Message Responses
		Messaging Plan Items
	LS Messaging Plan Call Objective Plan Page Layout	Books
		Message Responses
		Messaging Plan Items
Messaging Plan Item	LS Messaging Plan Item Page Layout	Message Responses
		Messaging Plan Item Relations
		Custom Objects 01-40
	LS Messaging Plan Item Call Objective Page Layout	Message Responses
		Messaging Plan Item Relations
		Custom Objects 01-40
Messaging Plan Item Relations	LS Messaging Plan Item Relations Page Layout	Custom Objects 01-40
	LS Messaging Plan Item Relations Next Call Objective Page Layout	Custom Objects 01-40
Message Response	LS Message Response Page Layout	Custom Objects 01-40
	LS Message Response Outcome Page Layout	Custom Objects 01-40
Objective	LS Objective Page Layout	Activities
		Books
		Objectives
		Objective Assessment
		Objective Team

Record Type	Page Layout	Displayed Information
		Opportunities
Order	LS Order Page Layout	Order Items
		Order Team
		Books
		Custom Objects 01-40
Sample Disclaimer	LS Sample Disclaimer Page Layout	Related Disclaimers
Sample Inventory	LS Sample Inventory Page Layout	Custom Objects 01-40 **Note:** Custom objects are not available for sample inventory records by default. If you require custom objects to be made available for sample inventories, then contact Customer Care to set this up for your company.
Sample Lot	LS Sample Lot Page Layout	Books
		Custom Objects 01-40
Sample Request	LS Sample Request Page Layout	Sample Request Team
		Books
Sample Transaction	LS Sample Transaction Page Layout **Note:** For sample transactions, you must use the user mode for record ownership because each sample transaction must be related to an inventory period for a specific user. Do not configure book mode or mixed mode for sample transactions. For more information on record ownership modes, see *Oracle CRM On Demand Online Help* .	Books
		Custom Objects 01-40
		Transactions Items
Solution	LS Solution Page Layout **Note:** Remove Service Requests from Displayed Information.	Books
		Messaging Plans

Record Type	Page Layout	Displayed Information
		Messaging Plan Items
		Messaging Plan Item Relations
		Related Solutions
Transaction Item	LS Transaction Item Page Layout	Custom Objects 01-40
You can set up custom objects as required, up to custom object 40. However,custom objects 16-40 require special permission. See *About Custom Objects*. Page layouts for structured product messaging are not available by default and must be set up by the Life Sciences administrator as described in *Setting Up Structured Product Messaging Dynamic Page Layouts*.		

Call Product Detail Page Layout

This topic describes the fields and related information sections available in the Call Product Detail page layout that sets the layout for the Products Detailed Related Information section in call records.

You typically configure the Call Product Detail page layout for the LS Account Call Page Layout, LS Contact Call Page Layout, and the LS Attendee Call Page Layout. For more information on configuring the page layouts, see the information on application customization in *Oracle CRM On Demand Online Help* .

Fields Available in the Call Product Detail Page Layout

Although additional fields are available in the Call Product Detail Page layout, the following fields are likely to be of interest to customers:

- Detail Notes
- Indication Name
- Primary Message Response, which you can rename to Primary Outcome
- Primary Messaging Plan Item, which you can rename to Primary Call Objective
- Primary Messaging Plan Item Relations, which you can rename to Primary Next Call Objective
- Type

Related Information Sections Available in Call Product Detail Page Layout

The following related information sections are available in the Call Product Detail page layout:

- Call Product Detail Message Responses, which you can rename to Call Product Detail Outcomes
- Call Product Detail Messaging Plan Items, which you can rename to Call Product Detail Call Objectives
- Call Product Detail Messaging Plan Item Relations, which you can rename to Call Product Detail Next Call Objectives

Record Types That Use the Call Product Detail Page Layout

The Call Product Detail page layout is available for the following records types:

- Message Response. The related information section is Call Product Detail Message Response, which you can rename to Call Product Detail Outcomes.
- Messaging Plan Item. The related information section is Call Product Detail Messaging Plan Item, which you can rename to Call Product Detail Call Objectives.
- Messaging Plan Item Relations. The related information section is Call Product Detail Messaging Plan Item Relations, which you can rename to Call Product Detail Next Call Objective.

Setting Up Structured Product Messaging Dynamic Page Layouts

The Messaging Plan, Messaging Plan Item, Messaging Plan Item Relation, and Message Response record types are collectively referred to as the personal content delivery (PCD) record types. Your company can repurpose the PCD record types to support structured product messaging (SPM), which allows users to manage their sales call objectives. You repurpose the PCD record types by defining dynamic page layouts for these records. By appropriately selecting the Type picklist field for a PCD record, an end user can dynamically change the page layout corresponding to the PCD record that is in place. For example, selecting Type with a value of Call Objective changes the page layout for a Messaging Plan Item to a Call Objective page layout.

The SPM page layouts that correspond to the PCD record types are: Call Objective Plan (for Messaging Plan), Call Objective (for Messaging Plan Item), Next Call Objective (for Messaging Plan Item Relations), and Outcome (for Message Response). Typically, a sales representative uses a call objective plan to record call objectives, next call objectives, and call outcomes for sales calls associated with a product (for example, a drug).

To set up Structured Product Messaging dynamic page layouts

1. Create the PCD page layouts for Messaging Plan, Messaging Plan Item, Messaging Plan Item Relation, and Message Response as described in the table in *Field Setup and Layout for the LS Field Sales Rep Role Page Layouts*.

   For related information on creating page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*.
2. Create the SPM page layouts (Call Objective Plan page layout, Call Objective page layout, Outcome page layout, and Next Call Objective page layout) as described in the following table.

   For related information on creating page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*.

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
Messaging Plan	LS Messaging Plan Call Objective Plan Page Layout	**Key Messaging Plan Information**	
		Name	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Type **Note:** Include Call Objective Plan as a choice for the Type picklist.	Required
		Product	Required
		Status	Required
		Verify	Read-Only
		Code	Optional
		Segment	Optional
		Start Date	Optional
		Expiration Date	Optional
		Release Date	Optional
		Disclosure Mandatory	Required
		Enable Followup	Required
		Lock Sequence	Required
		Additional Messaging Plan Information	
		Audience	Optional
		Comment	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Description	Optional
Messaging Plan Item	LS Messaging Plan Item Call Objective Page Layout	**Key Messaging Plan Item Information**	
		Sequence Number	Required
		Plan Item Name	Optional
		Display Name	Optional
		Currency	Read-Only
		Disclosure Message	Required
		Type **Note:** Include Call Objective as a choice for the Type picklist.	Required
		Send Type	Required
		Parent Messaging Plan	Required
		Status	Optional
		Description	Optional
Note: If Solution is not a required field in your page layout, then the Messaging Plan Item name defaults to the parent Messaging Plan name plus the Messaging Plan Item sequence number. For example, if you have a parent Messaging Plan called DrugABC Product Launch with four related Messaging Plan Items, then the names of the Messaging Plan Items are DrugABC Product Launch 1, DrugABC Product Launch 2, and so on. That is, the Messaging Plan Item name is a concatenation of the parent Messaging Plan name and the sequence number for the Messaging Plan Item.			
Messaging Plan Item Relations	LS Messaging Plan Item Relations Next Call Objective Page Layout	**Key Messaging Plan Item Relations Information**	

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Created	Optional
		Created By	Optional
		Created By: Email	Optional
		Created By: External Unique ID	Optional
		Created By: First Name	Optional
		Type **Note:** Include Next Call Objective as a choice for the Type picklist.	Required
		Solution Name	Optional
		Synopsis	Optional
		Name	Required
		Display Name	Required
		Parent MP Item	Required
Message Response	LS Message Response Outcome Page Layout	**Key Message Response Information**	
		Message Plan	Optional
		Sequence	Required
		Type	Required

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Note: Include Outcome as a choice for the Type picklist.	
		Message Plan Item	Optional
		Solution	Optional
		Response	Optional
		Notes	Optional
		Section	Optional
		Start Time	Optional
		End Time	Optional
		Duration	Read-Only
		Followup	Optional
		Account	Optional
		Account: External Unique ID	Read-Only
		Account: Integration ID	Read-Only
		Profile Information	
		Id	Read-Only
		Name	Required
		Contact	Optional

Record Type	Page Layout	Page Section Layout	Required, Read-Only, or Optional
		Contact: External Unique ID	Optional
		Contact: First Name	Optional
		Contact: Integration ID	Optional
		Contact: Last Name	Optional
Note: Message Response records that are repurposed as Outcomes for Structured Product Messaging can only be created by the administrator using Web services and not through the user interface. A user with the LS Field Sales Rep role can select an Outcome within the context of the Product Detail Related Information section. However, the administrative task of creating the Outcome values must be completed through Web services and not in the UI screen navigation.			

3. Set up the Type field to drive the dynamic page layout used by the field sales representative for each PCD record type:

   Note: Make sure you have set up the Type field on both PCD and SPM page layouts.

   a. In the upper right corner of any page, click the Admin global link.
   b. In the Application Customization section, click the Application Customization link.
   c. In the Record Type Setup section, click the link for one of the PCD record types:
      - Messaging Plan
      - Messaging Plan Item
      - Messaging Plan Item Relations
      - Message Response
   d. In the Dynamic Layout Management section, click the <PCD record type> Dynamic Layout link.
   e. In the Dynamic Page Layout list, click the New Layout button to create a new dynamic link layout.
   f. In Step 1 Specify Name:
      - Enter a name for the Dynamic Layout for the PCD record type you are setting up, for example:

        Messaging Plan Dynamic Layout

        Messaging Plan Item Dynamic Layout

        Messaging Plan Item Relations Dynamic Page Layout

        Message Response Dynamic Page Layout
      - Select a Default Layout. This layout is presented as the default layout in the next step.

- Set the Driving Picklist field to Type if required. The values of the Type picklist determine which layout the users can see.

g. In Step 2 Assign Layouts, associate the Type picklist values with a layout name as follows:

   - For Messaging Plan records:

     For a Type value of Call Objective Plan, associate the type value with the LS Messaging Plan Call Objective Plan Page Layout.

     For all other Type values, associate the type value with the LS Messaging Plan Page Layout.
   - For Messaging Plan Item records:

     For a Type value of Call Objective, associate the type value with the LS Messaging Plan Item Call Objective Page Layout.

     For all other Type values, associate the type value with the LS Messaging Plan Item Page Layout.
   - For Messaging Plan Item Relations records:

     For a Type value of Next Call Objective, associate the type value with the LS Messaging Plan Item Relations Next Call Objective Page Layout.

     For all other Type values, associate the type value with the LS Messaging Plan Item Relations Page Layout.
   - For Message Response records:

     For a Type value of Outcome, associate the type value with the LS Message Response Outcome Page Layout.

     For all other Type values, associate the type value with the LS Message Response Page Layout.

   Note: For each dynamic page layout, there is a limit of 200 associations between driving picklist values and page layouts.

   The layout you select is displayed when a record has the corresponding picklist value.

h. Click Finish

4. Assign the dynamic layouts you have created to the user roles that will use these layouts, for example, the Administrator or the LS Field Sales Rep role in the Role Management wizard:

   a. From the Admin Homepage, click User Management and Access Controls, then Role Management.
   b. Edit the role of the user who will use the dynamic page layouts, for example, the Administrator or the LS Field Sales Rep role.
   c. In Step 6 Page Layout Assignment, for each PCD record type:

      - For the Page View Type, choose Dynamic
      - For the Page Layout Name, select the dynamic page layout you created in Step f corresponding to that record type.

5 Setting Up Access Profiles and the Order Usage Option

Setting Up Access Profiles and the Order Usage Option

This chapter describes how to set up access profiles and the order usage option in Oracle CRM On Demand Life Sciences Edition, and access profiles for life sciences roles. It includes the following topics:

- *Setting Up Access Profiles for Life Sciences Roles*
- *Access Profile Settings for the LS Field Sales Rep Role*
- *Selecting the Order Usage Option*

Setting Up Access Profiles for Life Sciences Roles

You must set up two access profiles for each life sciences role:

- **Default access profile.** Sets the access levels for records that are 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 set up.

Complete the steps in the following procedure for each of the required access profiles.

This task is a step in *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition*.

To set up the default access and owner access profiles for a life sciences role

1. In the upper-right corner of any page in Oracle CRM On Demand, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the Access Profile Management section, click the Access Profiles link.
4. In the Access Profiles view, click the Copy link on the appropriate profile, as follows:
    - If you are setting up a default access profile, then click the Copy link on a default access profile that is similar to the one you want to set up.
    - If you are setting up an owner access profile, then click the Copy link on an owner access profile that is similar to the one you want to set up.

    For information about typical access profiles for the LS Field Sales Rep role, see *Access Profiles for the LS Field Sales Rep Role*.
5. In Step 1 (Access Profile Name) of the Access Profile wizard, do the following:
    a. Enter a name for the access profile.

    For example, enter LS Field Sales Rep Default Access Profile or LS Field Sales Rep Owner Access Profile.

b. If you want the access profile to be available to be assigned to team members, then select the Grantable to Team Members check box.

   If you select this check box, then configure the access profile settings for each life sciences role with the top-level and related information access settings that are shown in the tables in *Access Levels for the LS Field Sales Rep Role*.

6. In Step 2 (Specify Access Levels) of the Access Profile wizard, change the access settings for the top-level profile and the related information items for the life sciences role, as necessary.

   For information about typical access settings for the LS Field Sales Rep role, see *Access Levels for the LS Field Sales Rep Role*.

7. Click Finish.

Access Profile Settings for the LS Field Sales Rep Role

This topic shows the access profile settings or access levels for the LS Field Sales Rep role. Use these profile settings in each access profile for a life sciences role, especially for access profiles that have the Grantable to Team Members check box selected.

This topic contains the following information:

- *Access Profiles for the LS Field Sales Rep Role*
- *Access Levels for the LS Field Sales Rep Role*

For instructions on setting up a default access and owner access profile for a life sciences role, see *Setting Up Access Profiles for Life Sciences Roles*.

Access Profiles for the LS Field Sales Rep Role

For the LS Field Sales Rep role, you create a copy of the access profiles used for the life sciences administrator role. The following table shows the names of the access profiles that life sciences administrators configure for the LS Field Sales Rep role. For instructions on setting up a default access or owner access profile for a life sciences role, see *Setting Up Access Profiles for Life Sciences Roles*.

Copy	Name of New Access Profile
LS Administrator Default Access Profile	LS Field Sales Rep Default Access Profile
LS Administrator Owner Access Profile	LS Field Sales Rep Owner Access Profile

Access Levels for the LS Field Sales Rep Role

The following table shows the access levels for the top-level profile that life sciences administrators configure for the LS Field Sales Rep role. For example, specify Read-Only as the default access level and Read/Edit/Delete as the Owner Access level for the Allocation record type.

All access profiles that are Grantable to Team Members (that is, have the Grantable to Team Members check box selected), must be configured with the top-level and related information access settings described in the following two tables.

For instructions on setting up a default access or owner access profile for a life sciences role, see *Setting Up Access Profiles for Life Sciences Roles*.

Record Type	Default Access	Owner Access
Account	Read-Only	Read/Edit/Delete
Activity	Read-Only	Read/Edit/Delete
Allocation	Read-Only	Read/Edit/Delete
Business Plan	Read-Only	Read/Edit/Delete
Blocked Products	Read-Only	Read-Only
Call Product Detail	Read-Only	Read/Edit/Delete
Campaign	Read-Only	Read/Edit/Delete
Contact	Read-Only	Read/Edit/Delete
Contact State License	Read-Only	Read/Edit/Delete
Forecast	Read-Only	Read/Edit/Delete
HCP Contact Allocation	Read-Only	Read/Edit/Delete
Inventory Audit Report	Read-Only	Read/Edit
Inventory Period	Read-Only	Read/Edit
Event	Read-Only	Read/Edit/Delete
Messaging Plan	Read-Only	Read-Only
Messaging Plan Item	Read-Only	Read-Only
Messaging Plan Item Relations	Read-Only	Read-Only
Message Response	Read-Only	Read/Edit/Delete

Record Type	Default Access	Owner Access
Objective	Read-Only	Read/Edit/Delete
Opportunity	Read-Only	Read/Edit/Delete
Order	Read-Only	Read/Edit/Delete
Order Item	Read-Only	Read/Edit/Delete
Plan Account	Read-Only	Read/Edit/Delete
Plan Contact	Read-Only	Read/Edit/Delete
Plan Opportunity	Read-Only	Read/Edit/Delete
Product Indication	Read-Only	Read/Edit/Delete
Related Disclaimer	Read-Only	Read-Only
Sample Disclaimer	Read-Only	Read-Only
Sample Inventory	Read-Only	Read/Edit/Delete
Sample Lot	Read-Only	Read-Only
Sample Request	Read-Only	Read/Edit/Delete
Sample Request Item	Read-Only	Read/Edit/Delete
Sample Transaction	Read-Only	Read/Edit/Delete
Signature	Read-Only	Read-Only
Smart Call	Read-Only	Read/Edit/Delete
Solution	Read-Only	Read-Only
Transaction Item	Read-Only	Read/Edit/Delete

To set the access levels for the related items, click the Related Information link next to a record type. The following table shows the access levels for the related information items that life sciences administrators configure for the LS Field

Sales Rep role. For instructions on setting up a default access or owner access profile for a life sciences role, see *Setting Up Access Profiles for Life Sciences Roles*.

Record Type	Related Information	Default Access	Owner Access
Account	Account Event	No Access	Full
	Account Relationships	Full	Full
	Account Survey	Read-Only	Full
	Account Team	Full	Full
	Addresses	Full	Full
	Calls	View	View
	Contacts	No Access	View
	Objectives	View	View
	Orders	No Access	View
	Plan Accounts	Full	View
	Revenues	Read-Only	Read-Only
Allocation	Books	Read-Only	Full
	Custom Objects 01-40	Read-Only	Full
Activity	Activity Assessment	Read-Only	Full
	Available Message Plans	Read-Only	Full
	Available Products for Detailing	Read-Only	Full
	Available Promotional Items for Drop	Read-Only	Full
	Available Samples for Drop	Read-Only	Full
	Message Responses	View	View
	Products Detailed	Read-Only	Full

Record Type	Related Information	Default Access	Owner Access
	Promotional Items Dropped	Read-Only	Full
	Samples Dropped	Read-Only	Full
	Sample Transactions	View	View
	Signature	Read-Only	Full
	Solutions	View	View
	Custom Objects 01-03	Inherit Primary	Inherit Primary
Address	Account	Read-Only	Read-Only
	Contact	Read-Only	Read-Only
	Custom Objects 01-40	Read-Only	Full
	Dealer	Read-Only	Read-Only
	Partner	Read-Only	Read-Only
Business Plan	Activities	Inherit Primary	Inherit Primary
	Books	Read-Only	Full
	Business Plan Teams	Read-Only	Full
	Business Plans	View	View
	Business Plans Assessments	Read-Only	Full
	Objectives	Inherit Primary	Inherit Primary
	Plan Accounts	Inherit Primary	Inherit Primary
	Plan Contacts	Inherit Primary	Inherit Primary
	Plan Opportunities	Inherit Primary	Inherit Primary
Call Product Detail	Call Product Detail Message Responses	View	Inherit Primary

Record Type	Related Information	Default Access	Owner Access
Note: Call Product Detail is a child of the Activity record, and it is not a top-level record.	Call Product Detail Messaging Plan Items	View	Inherit Primary
	Call Product Detail Messaging Plan Item Relations	View	Inherit Primary
Contact	Accounts	View	View
	Addresses	Read-Only	Full
	Blocked Products	Read-Only	Read-Only
	Calls	View	View
	Contact Best Times	Read-Only	Full
	Contact Relationships	Read-Only	Full
	Contact State Licenses	View	View
	Contact Team	Read-Only	Full
	Event	Read-Only	Read-Only
	Objectives	View	View
	Orders	No Access	View
	Plan Contacts	Read-Only	Full
	Referrals	No Access	No Access
	Revenues	No Access	No Access
	Signature	No Access	No Access
Event	Account Event	No Access	Full
	Books	Full	Full
	Completed Activities	View	View

Record Type	Related Information	Default Access	Owner Access
	Custom Objects 01-40	Read-Only	Full
	Event Team	Read-Only	Full
	Invitees	Full	Full
	Open Activities	View	View
Inventory Audit Report	Books	Read-Only	Full
	Sample Inventory	Read-Only	Full
Inventory Period	Books	Read-Only	Full
	Custom Objects 01-40	Read-Only	Full
	Inventory Audit Reports	View	View
	Sample Inventory	Read-Only	Full
	Sample Transactions	View	View
Invitee	Custom Objects 01-40	Read-Only	Full
Messaging Plan	Books	Read-Only	Read-Only
	Message Responses	View	View
	Messaging Plan Items	Inherit Primary	Full
Messaging Plan Item	Message Responses	View	View
	Messaging Plan Item Relations	Read-Only	Full
	Custom Objects 01-40	Read-Only	Full
Messaging Plan Item Relations	Custom Objects 01-40	Read-Only	Full
Message Response	Custom Objects 01-40 .	Read-Only	Full
Objective	Activities	Inherit Primary	Inherit Primary

Record Type	Related Information	Default Access	Owner Access
	Books	Read-Only	Full
	Objective Teams	Read-Only	Full
	Objectives	Inherit Primary	View
	Objective Assessments	Read-Only	Full
	Opportunities	Inherit Primary	Inherit Primary
Opportunity	Plan Opportunities	Read-Only	Full
Order	Order Items	Read-Only	Full
	Custom Objects 01-40	Read-Only	Full
Order Item	Custom Objects 01-40	Read-Only	Full
Period	Business Plans	View	View
	Messaging Plans	View	View
	Objectives	View	View
Sample Disclaimer	Related Disclaimers	Read-Only	Read-Only
Sample Inventory	Custom Objects 01-40	Read-Only	Full
Sample Lot	Books	Read-Only	Full
	Custom Objects 01-40	Read-Only	Full
Sample Transaction	Books	Read-Only	Full
	Custom Objects 01-40	Read-Only	Full
	Transaction Items	Inherit Primary	Inherit Primary
Smart Call	Books	Read-Only	Read/Edit/Delete
	Products Detailed	Read-Only	Read or Create

Record Type	Related Information	Default Access	Owner Access
	Promotional Items Dropped	Read-Only	Read or Create
	Samples Dropped	Read-Only	Read or Create
Solution	Books	View	Full
	Messaging Plans	View	View
	Messaging Plan Items	View	Full
	Messaging Plan Item Relations	View	Full
	Related Solutions	Read-Only	View
	Solution Product	View	View
Transaction Item	Custom Objects 01-40	Read-Only	Full
You can set up custom objects as required, up to custom object 40. However,custom objects 16-40 require special permission. See *About Custom Objects*.			

Selecting the Order Usage Option

Customers can use the order functionality in Oracle CRM On Demand for order management in either Oracle CRM On Demand Life Sciences Edition or Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite (Lead to Order: CRM OD - EBS PIP).

The Enable Order Access privilege determines whether the order functionality is available.

> **CAUTION:** If your company already uses the Lead to Order: CRM OD – EBS PIP integration pack, then your company cannot use the order management functionality in Oracle CRM On Demand Life Sciences Edition. The Order Usage setting on the company profile determines for which purpose the order functionality is used.

This task is a step in *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition*.

To select the order usage option for Oracle CRM On Demand Life Sciences Edition, complete the following procedure.

To select the order usage option for Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin global link.
2. Click Company Administration, and then Company Profile.
3. In the Company Profile page, click Edit.
4. In the Company Settings section of the Company Edit page, in the Order Usage field, select CRM On Demand Order Management.
5. Save your changes.

6 Setting Up Roles

Setting Up Roles

This chapter describes how to set up a typical role in Oracle CRM On Demand Life Sciences Edition, and access profiles for life sciences roles. It includes the following topics:

- *Creating Life Sciences Roles*
- *Role Settings for the LS Field Sales Rep Role*

Creating Life Sciences Roles

Complete the steps in the following procedure to create a life sciences role. This task is a step in *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition*.

To create a life sciences role

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

   For example, to create the LS Field Sales Rep role, copy the life sciences administrator role. The Role Management wizard opens.
3. In Step 1 of the wizard, enter the role name (for example, LS Field Sales Rep) and description.
4. In the wizard, go to Step 2 (Record Type Access), and adjust the settings for the role, as necessary.

   For information about the record type access settings for the LS Field Sales Rep role, see *Record Type Access for the LS Field Sales Rep Role*.
5. In the wizard, go to Step 3 (Access Profiles), and select the access profiles that you created earlier for the life sciences role.
6. In the wizard, go to Step 4 (Privileges), and adjust the settings for the role, as necessary.

   For information about privilege settings for the LS Field Sales Rep role, see *Privileges for the LS Field Sales Rep Role*.
7. In the wizard, go to Step 5 (Tab Access & Order), and adjust the settings for the role, as necessary.

   For information about tab settings for the LS Field Sales Rep role, see *Tab Access and Order for the LS Field Sales Rep Role*.
8. In the wizard, go to Step 6 (Page Layout Assignment), and assign a page layout to each record type.

   For information about page layout assignment for the LS Field Sales Rep role, see *Page Layout Assignment for the LS Field Sales Rep Role*.
9. In the wizard, go to Step 7 (Search Layout Assignment), and assign a search layout to each record type.
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 search layouts, and homepage layouts, see *Oracle CRM On Demand Online Help* .

11. Click Finish.

Role Settings for the LS Field Sales Rep Role

This topic describes the typical role settings for the LS Field Sales Rep role. It contains the following information:

- *Record Type Access for the LS Field Sales Rep Role*
- *Privileges for the LS Field Sales Rep Role*
- *Tab Access and Order for the LS Field Sales Rep Role*
- *Page Layout Assignment for the LS Field Sales Rep Role*

Record Type Access for the LS Field Sales Rep Role

The following table shows the record type access that life sciences administrators configure for the LS Field Sales Rep role. For example, select the Has Access and Can Create check boxes for the Account record type, but do not select the Can Read All Records check box. For instructions on creating a life sciences role, see *Creating Life Sciences Roles*.

Record Type	Has Access	Can Create	Can Read All Records
Account	Selected	Selected	Not selected
Activity	Selected	Selected	Not selected
Allocation	Selected	Not selected	Not selected
Blocked Products	Selected	Not selected	Not selected
Book	Selected	Not selected	Not selected
Business Plan	Selected	Selected	Not selected
Campaign	Selected	Selected	Not selected
Contact	Selected	Selected	Not selected
Contact State License	Selected	Selected	Selected
Custom Object 01-40	Selected (for custom objects as required)	Selected (for custom objects as required)	Selected (for custom objects as required)

Record Type	Has Access	Can Create	Can Read All Records
Note: Custom objects 16-40 require special permission. See *About Custom Objects*.			
Event	Selected	Selected	Not selected
Forecast	Selected	Selected	Not selected
HCP Contact Allocation	Selected	Not selected	Not selected
Inventory Audit Report	Selected	Selected	Not selected
Inventory Period	Selected	Selected	Not selected
Message Response	Selected	Selected	Not selected
Messaging Plan	Selected	Not selected	Not selected
Messaging Plan Item	Selected	Not selected	Selected
Messaging Plan Item Relations	Selected	Not selected	Selected
Objective	Selected	Selected	Not selected
Order	Selected	Selected	Not Selected
Order Item	Selected	Selected	Not Selected
Plan Accounts	Selected	Selected	Selected
Plan Contact	Selected	Selected	Selected
Plan Opportunity	Selected	Selected	Selected
Product Indication	Selected	Not selected	Selected
Products Detailed	Selected	Selected	Selected
Related Disclaimer	Selected	Not selected	Selected
Sample Disclaimer	Selected	Not selected	Selected

Record Type	Has Access	Can Create	Can Read All Records
Sample Inventory	Selected	Selected	Not selected
Sample Lot	Selected	Not selected	Selected
Sample Request	Selected	Selected	Not Selected
Sample Request Item	Selected	Selected	Not Selected
Sample Transaction	Selected	Selected	Not selected
Signature	Selected	Selected	Not selected
Smart Call	Selected	Selected	Selected
Solution	Selected	Not selected	Not selected
Transaction Item	Selected	Selected	Not selected

Privileges for the LS Field Sales Rep Role

The following table shows the privilege settings that life sciences administrators configure for the LS Field Sales Rep role. For example, assign the Enable Basic Samples Operation privilege in the Industry Specific: Life Sciences category (that is, select the Assign check box) for the LS Field Sales Rep role. For instructions on creating a life sciences role, see *Creating Life Sciences Roles*.

Category	Privilege	Assign
CRM: Sales	Enable Order Access **Note:** If you cannot see this privilege, then contact Customer Care and ask the agent to turn on this privilege for you.	Selected
CRM: Sales	Manage Business Planning Access	Selected
Desktop/Mobile	Enable Access to Disconnected Mobile Sales **Note:** This privilege is required for users to load and reload data on to their mobile device.	Selected

Category	Privilege	Assign
Industry Specific: Life Sciences	Calls: Calendar Planned Calls	Selected
Industry Specific: Life Sciences	Calls: Enable Call Detailing	Selected
Industry Specific: Life Sciences	Enable Basic Samples Operation	Selected
Industry Specific: Life Sciences	Enable Samples Adjustment	Selected
Industry Specific: Life Sciences	Manage Events Access	Selected
Industry Specific: Life Sciences	Manage Personalized Content Delivery (PCD) **Note:** If your company has decided to use Structured Product Messaging (SPM), then select this privilege because Oracle CRM On Demand repurposes the PCD objects for the SPM metadata definitions (for example, call objective).	Selected
Industry Specific: Life Sciences	Manage Pharmaceutical Access	Selected
Customization: Data	Customize Application - Manage Custom Object 01	Selected
Customization: Data	Customize Application - Manage Custom Object 02	Selected
Customization: Data	Customize Application - Manage Custom Object 03	Selected
Customization: Data	Customize Application - Manage Custom Object 04-10	Selected
Customization: Data	Customize Application - Manage Custom Object 11-15	Selected
Customization: Data	Customize Application - Manage Custom Object 16-20	Selected
Customization: Data	Customize Application - Manage Custom Object 21-25	Selected
Customization: Data	Customize Application - Manage Custom Object 26-30	Selected
Customization: Data	Customize Application - Manage Custom Object 31-35	Selected
Customization: Data	Customize Application - Manage Custom Object 36-40	Selected

Category	Privilege	Assign
Note: To associate price lists with orders, users with the LS Field Sales Rep role must have either the Enable Order Access privilege or the Enable Basic Samples Operations privilege set up on their role. To set up price lists for orders in Oracle CRM On Demand Life Sciences Edition, life science administrators must have the Manage Content privilege and the Enable Order Access privilege set up on their role. Contact Customer Care to have the agent set up the appropriate privileges to set up the creation and maintenance of price lists.		

Tab Access and Order for the LS Field Sales Rep Role

The following table shows the tab access and order settings that life sciences administrators configure for the LS Field Sales Rep roles. For example, move Allocations to Selected Tabs, Contact State License to Available Tabs, Messaging Plan Item to Not Available Tab, and so on. Use the up and down arrows to order your tabs in the Selected Tabs box. For instructions on creating a life sciences role, see *Creating Life Sciences Roles*.

Tab	Move To
Allocation	Selected Tabs
Business Plan	Selected Tabs
Contact State License	Available Tabs
Custom Object 01-40 (as required) **Note:** Custom objects 16-40 require special permission. See *About Custom Objects*.	Available Tabs
Event	Selected Tabs
HCP Contact Allocation	Selected Tabs
Inventory Period	Selected Tabs
Messaging Plan	Selected Tabs
Messaging Plan Item	Not Available Tab
Messaging Plan Item Relation	Not Available Tab
Objective	Selected Tabs

Tab	Move To
Order	Selected Tab
Order Item	Not Available Tab
Plan Account	Not Available Tab
Plan Contact	Not Available Tab
Plan Opportunity	Not Available Tab
Product Indication	Not Available Tab
Sample Disclaimer	Selected Tabs
Sample Inventory	Selected Tabs
Sample Lot	Not Available Tab
Sample Request	Selected Tab
Sample Request Item	Not Available Tab
Sample Transaction	Selected Tabs
Transaction Item	Not Available Tab

Page Layout Assignment for the LS Field Sales Rep Role

The following table shows the page layout assignment that life sciences administrators configure for the LS Field Sales Rep roles. For example, select LS Account Page Layout for the Account record type, LS Account Call Page for the Account Call record type, and so on. For instructions on creating a life sciences role, see *Creating Life Sciences Roles*.

Record Type	Page Layout Name
Account	LS Account Page Layout
	LS Account Relationship Page Layout
	LS Account Contact Page Layout

Record Type	Page Layout Name
Account Call (Activity record type)	LS Account Call Page Layout
Allocation	Allocation Page Standard Layout
Attendee Call	LS Attendee Call Page Layout
Business Plan	LS Business Plan Page Layout
Contact	LS Contact Page Layout
	LS Contact Relationship Page Layout
Contact Best Time	Contact Best Time Page Standard Layout
Contact Call (Activity record type)	LS Contact Call Page Layout
Contact State License	Contact State License Page Standard Layout
Event	LS Event Page Layout
HCP Contact Allocation	HCP Contact Allocation Page Standard Layout
Inventory Audit Report	Inventory Audit Report Page Standard Layout
Inventory Period	LS Inventory Period Page Layout
Invitee	LS Invitee Page Layout
Messaging Plan	LS Messaging Plan Page Layout
Messaging Plan Item	Messaging Plan Item Page Standard Layout
Messaging Plan Item Relations	Messaging Plan Item Relations Page Standard Layout
Message Response	LS Message Response Page Layout
Objective	LS Objective Page Layout
Order	LS Order Page Layout
Order Item	LS Order Item Page Layout

Record Type	Page Layout Name
Plan Accounts	Plan Account Page Standard Layout
Plan Contact	Plan Contact Page Standard Layout
Plan Opportunity	Plan Opportunity Page Standard Layout
Sample Disclaimer (global)	Sample Disclaimer Page Standard Layout
Sample Disclaimer (multilingual)	LS Sample Disclaimer Page Layout
Sample Inventory	LS Sample Inventory Page Standard Layout
Sample Lot	LS Sample Lot Page Standard Layout
Sample Request	LS Sample Request Page Layout
Sample Request Item	LS Sample Request Item Page Layout
Sample Transaction	LS Sample Transaction Page Layout
Signature	Signature Page Standard Layout
Smart Call (Activity record type)	LS Smart Call Page Layout
Solution	LS Solution Page Layout
Transaction Item	LS Transaction Item Page Standard Layout

7 Setting Up Business Processes to Lock Records

Setting Up Business Processes to Lock Records

This chapter describes how to set up a business process to lock records in Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

- *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*
- *Creating a Business Process to Lock Call Activity Records*
- *Creating a Business Process to Lock Sample Transaction Records*
- *Creating a Business Process to Lock Messaging Plan Records*
- *Creating a Business Process to Lock Solution Records*
- *Creating a Business Process to Lock Validated Address Records*
- *Creating a Business Process to Lock Sample Request Records*
- *Creating a Business Process to Lock Call Product Detail Records*
- *Creating a Business Process to Lock Sample Disclaimer Records*
- *Creating a Business Process to Lock Records in General*

> **Note:** References to the Submitted call activity status in the procedures documented in this chapter assume that you are using the default values for this status picklist. If you have modified the values, the procedures might not apply to you.

Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition

A number of record types can be locked in Oracle CRM On Demand Life Sciences Edition. This task is a step in *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition*.

> **Note:** Certain users are given the Override Process Administration privilege so that they can update locked records. Users who have the Override Process Administration privilege enabled for their role can fully interact with a record, that is, view, edit, or delete the record, even when the record is locked by a process administration rule. If a user has this privilege enabled, then Oracle CRM On Demand proceeds as if no process administration rules exist when the user interacts with the record type. For more information about the Override Process Administration privilege, see *Oracle CRM On Demand Online Help* .

To set up a business process to lock records in Oracle CRM On Demand Life Sciences Edition

1. Ask your company administrator to set up the Process Administration privilege for your role, as described in the following table.

   This privilege allows you to define role-based business processes with conditional state transitions and dynamic access controls.

Category	Privilege	Assign
Customization: Business Rules	Process Administration	Selected

   It is recommended that only Oracle CRM On Demand administrators have the authority to create, edit, and delete business rules. Sales representatives must not have this privilege set up.
2. Create a business process to lock records for each life sciences record type that you want to lock.

   Each business process must define the primary values, transition states, and field setup for the record type as required. See the following topics for more information:

   - *Creating a Business Process to Lock Call Activity Records*
   - *Creating a Business Process to Lock Sample Transaction Records*
   - *Creating a Business Process to Lock Messaging Plan Records*
   - *Creating a Business Process to Lock Solution Records*
   - *Creating a Business Process to Lock Validated Address Records*
   - *Creating a Business Process to Lock Sample Request Records*
   - *Creating a Business Process to Lock Call Product Detail Records*
   - *Creating a Business Process to Lock Sample Disclaimer Records*
   - *Creating a Business Process to Lock Records in General*

     This business process applies to the following record types: Account, Business Plan, Lead, Objective, Opportunity, and Service Request.
3. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Creating a Business Process to Lock Call Activity Records

You can create a business process to lock call activity records (of type Account Call, Attendee Call, and Professional Call) so that when the status of the call activity changes to a given value, the call activity record and all associated child records (Sample Dropped, Products Detailed, and Promotional Items Dropped) are locked; that is, you cannot delete or modify them.

The following conditions apply to Account, Attendee, and Professional (Contact) Call activity record types:

- When the call activity status is set to In Progress, you can add, update, and delete records of the type Samples Dropped, Products Detailed, and Promotional Items Dropped to the call activity.
- When the call activity status is set to Signed or Submitted, you cannot add, update, or delete records of the type Samples Dropped, Products Detailed, or Promotional Items Dropped to the call activity.
- When the call activity status is set to Signed, you cannot delete the call activity record or update the following fields in the call activity record because they are locked: Primary Contact, Account, Start Time, Duration, and End Time.

  Note: When process locking rules are triggered, Oracle CRM On Demand locks a parent record and its child records, for example, a Sample Request and Sample Request Items. In the case of an Activity record, its child record, Call Product Detail, can also have Structured Product Messaging records (Call Objective Plan, Call Objective, Next Call Objective, and Outcome) as its child records. In this case, the Structured Product Messaging (SPM) records are grandchildren records of an Activity record. To set up process locking for the Call Product Detail record and its child SPM records, you must set up two product locking rules: one for the grandparent Activity record as described in this topic, and one for the parent Call Product Detail record, as described in *Creating a Business Process to Lock Call Product Detail Records*.

  Use the following procedure to create a business process to lock call activity records in Oracle CRM On Demand Life Sciences Edition that satisfy these conditions. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

Note: This procedure is only an example. Configuring a business process to lock call activity records varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

To create a business process to lock call activity records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, Locking a Call Activity Record.
   b. In the Object Name field, select Activity from the menu.

      The Primary Field automatically displays Call Type by default.

      The Transition field automatically displays Status by default.
   c. (Optional) In the Description field, enter a description of the business process.
   d. Click Save.
3. On the Process List page, open the business process (Locking a Call Activity Record) that you just created.
4. On the Process Detail page, click Add in the Primary Values section, add the Account Call, Attendee Call, and Professional Call primary values, then click Save.
5. On the Process Detail page, click Add in the Transition States section, and set up the transition states described in the following table for the activity process:

State	Disable Update Check Box	Disable Delete/Remove Check Box
Not Started	Not selected	Not selected

State	Disable Update Check Box	Disable Delete/Remove Check Box
In Progress	Not selected	Not selected
Planned	Not selected	Not selected
Completed	Not selected	Selected
Submitted	Selected	Selected
Submitting	Not selected	Not selected
Signed	Selected	Selected
Deferred	Not selected	Selected

6. On the Process Detail page in the Transition States section, configure the transition states:

    a. Open the transition state.
    b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

        For example:

        - For the Not Started and In Progress transition states, all fields must be available for update, so do not select read-only for any fields.
        - For the Completed transition state, select read-only for some fields but not for fields that must be available for update.
        - For the Submitted transition state, all fields must be locked so select read-only for all fields that you add.

    c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as described in the following table:

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/ Remove Check Box
- Not Started - In Progress - Submitting	Attachments	Not selected	Not selected	Not selected
	Books	Not selected	Not selected	Not selected
	Contacts	Not selected	Not selected	Not selected

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/ Remove Check Box
	Custom Objects 1-3	Not selected	Not selected	Not selected
	Message Responses	Not selected	Not selected	Not selected
	Products Detailed	Not selected	Not selected	Not selected
	Promotional Items Dropped	Not selected	Not selected	Not selected
	Samples Dropped	Not selected	Not selected	Not selected
	Sample Request	Not selected	Not selected	Not selected
	Sample Transactions	Not selected	Not selected	Not selected
	Signatures	Not selected	Not selected	Not selected
	Solutions	Not selected	Not selected	Not selected
- Completed - Deferred	Attachments	Not selected	Not selected	Selected
	Books	Not selected	Not selected	Selected
	Contacts	Not selected	Not selected	Selected
	Custom Objects 1-3	Not selected	Not selected	Selected
	Message Responses	Not selected	Not selected	Selected
	Products Detailed	Not selected	Not selected	Selected
	Promotional Items Dropped	Not selected	Not selected	Selected
	Samples Dropped	Not selected	Not selected	Selected

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/ Remove Check Box
	Sample Transactions	Not selected	Not selected	Selected
	Signatures	Not selected	Not selected	Selected
	Solutions	Not selected	Not selected	Selected
- Submitted - Signed	Attachments	Selected	Selected	Selected
	Books	Selected	Selected	Selected
	Contacts	Selected	Selected	Selected
	Custom Objects 1-3	Selected	Selected	Selected
	Message Responses	Selected	Selected	Selected
	Products Detailed	Selected	Selected	Selected
	Promotional Items Dropped	Selected	Selected	Selected
	Samples Dropped	Selected	Selected	Selected
	Sample Request	Selected	Not selected	Selected
	Note: This configuration allows for the status of the sample request to change but does not allow a new sample request to be added or the current sample request to be deleted. You must configure sample requests at the field level to lock down the sample request fields and allow updates to the status field. For more information on field level locking for sample requests, see *Creating a Business Process to Lock Sample Request Records*.			
	Sample Transactions	Selected	Selected	Selected
	Signatures	Selected	Selected	Selected
	Solutions	Selected	Selected	Selected

   d. Click Save.
7. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Call Activity Record State Stage Definitions

The following table describes the state stages for a call activity record of type account, attendee, or professional call.

State Stage	Description
In Progress	All newly created account or professional call activity records have a status of In Progress.
Planned	Newly created professional, attendee, or account calls that are created automatically initially have a status of Planned.
Completed	This means that the professional, attendee, or account call has completed, but all details have not been entered into Oracle CRM On Demand yet.
Submitted	When an account or professional call is submitted (by clicking the Submit button), its status changes to Submitted. At this point, the call is locked and no modifications can be made to the record.
Submitting	When an account, attendee or profession call is in the process of being submitted from the Oracle CRM On Demand Disconnected Mobile Sales application. After all processing has completed, Oracle CRM On Demand changes the status to Submitted and locks the record according to the related access control defined for the Submitted and Signed transition state entry in the table in Step c in *Creating a Business Process to Lock Call Activity Records*.
Signed	This means that the account or professional call has completed and a signature acquired. At this point, the record is locked and no changes can be made to it.
Deferred	A planned account or professional call can be rescheduled or deferred.

Creating a Business Process to Lock Sample Transaction Records

You can configure a business process to lock sample transaction records so that after a sample transaction is submitted, it cannot be modified. The following conditions apply:

- When the transaction status is set to Submitted, Processed, or Processed with Discrepancies, you cannot edit any of the fields in the record because they are read-only (except for Comments), and you cannot delete the transaction record.
- When the transaction status is set to In Transit, you cannot edit any of the fields in the record because they are read-only (except for the Comments and Date fields), and you cannot delete the transaction record. You can edit the Comments field after a transaction is submitted.

If you want to change a sample transaction that has already been submitted, then you must create a new sample transaction of the type Inventory Adjustment.

Use the following procedure to create a business process to lock sample transaction records in Oracle CRM On Demand Life Sciences Edition that satisfy these conditions. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

Note: This procedure is only an example. Configuring a business process to lock sample transaction records varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

To create a business process to lock sample transaction records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:
    a. Enter a name for the process in the Process Name field, for example, Locking a Sample Transaction Record.
    b. In the Object Name field, select Sample Transaction from the menu.

       The Transition field automatically displays Status by default.
    c. (Optional) In the Description field, enter a description of the business process.
    d. Click Save.
3. On the Process List page, open the business process (Locking a Sample Transaction Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as described in the following table:

State	Disable Update Check Box	Disable Delete/Remove Check Box
Submitted	Selected	Selected
In Transit	Not selected	Selected
Processed	Selected	Selected
Processed with Discrepancies	Selected	Selected
Adjusted	Selected	Selected

5. On the Process Detail page in the Transition States section, configure the transition states:
    a. Open the transition state.
    b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

For example:

- For the Submitted, Processed, and Processed with Discrepancies transition states, select read-only for all fields except the Comments field.
- For the In Transit transition state, select read-only for all fields except the Comments and Date fields.

c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as described in the following table:

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/ Remove Check Box
Submitted	Transaction Items	Selected	Selected	Selected
In Transit	Transaction Items	Selected	Not selected	Selected
Processed	Transaction Items	Selected	Selected	Selected
Processed with Discrepancies	Transaction Items	Selected	Selected	Selected
Adjusted	Transaction Items	Selected	Selected	Selected

d. Click Save.

6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Sample Transaction Record State Stage Definitions

The following table describes the state stages for a sample transaction record.

State Stage	Description
In Progress	When you create a professional call or an account call, its state is initially set to In Progress.
Submitted	The sample transaction is submitted. For example, you can submit a sample transaction of the type Transfer Out.
InTransit	The sample transaction is in transit mode. For example, when you submit a sample transaction of the type Transfer Out, its status changes to Submitted, and Oracle CRM On Demand automatically creates a new recipient transaction record of the type Transfer In with a status of In Transit.
Processed	The sample transaction is processed without any discrepancies. For example, when you acknowledge the full receipt of a samples transfer, the status of the sample transaction changes to Processed. For more information about acknowledging full receipt of a samples transfer, see *Oracle CRM On Demand Online Help* .

State Stage	Description
Processed With Discrepancies	The sample transaction is processed with discrepancies. For example, when you acknowledge the partial receipt of a samples transfer, the status of the transaction changes to Processed with Discrepancies. For more information about acknowledging partial receipt of a samples transfer, see *Oracle CRM On Demand Online Help* .
Adjusted	The sample transaction has been adjusted. To resolve discrepancies between physical counts and electronic counts of the inventory, end users and samples administrators must create and submit adjustment transactions.
Rejected	The sample transaction has not been approved.

Creating a Business Process to Lock Messaging Plan Records

You can create a business process to lock messaging plan records so that when a messaging plan has been released (the status is set to Released), all fields in the messaging plan record are locked (except for Expiration Date), and you cannot edit or delete the messaging plan record.

Use the following procedure to create a business process to lock messaging plan records in Oracle CRM On Demand Life Sciences Edition that satisfy this condition. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

> **Note:** This procedure is only an example. Configuring a business process to lock messaging plan records varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

To create a business process to lock messaging plan records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, *Locking a Messaging Plan Record*.
   b. In the Object Name field, select Messaging Plan from the menu.

      The Transition field automatically displays *Status* by default.
   c. (Optional) In the Description field, enter a description of the business process.
   d. Click Save.
3. On the Process List page, open the business process (Locking a Messaging Play Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition state for the business process as described in the following table:

State	Disable Update Check Box	Disable Delete/Remove Check Box
Released	Not selected	Selected

5. On the Process Detail page in the Transition States section, configure the transition state:

   a. Open the Released transition state.
   b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

      For example, select read-only for all fields except the Expiration Date field.
   c. On the Transition State Detail page, click Add in the Related Access Control section, then add the following related access controls for the transition state:

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/ Remove Check Box
Released	Books	Selected	Selected	Selected
	Message Responses	Selected	Selected	Selected
	Messaging Plan Items	Selected	Selected	Selected

   d. Click Save.
6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Messaging Plan Record State Stage Definitions

The following table describes the state stages for a messaging plan record.

State Stage	Description
Released	The messaging plan has been released.

Creating a Business Process to Lock Solution Records

You can create a business process to lock solution records so that when a solution has been approved by Marketing and Legal (that is, the Marketing Approval and Legal Approval check boxes are selected), all fields in the solution record are locked (except for the Expiration Date), and you cannot edit or delete the solution record.

Use the following procedure to create a business process to lock solution records in Oracle CRM On Demand Life Sciences Edition that satisfy this condition. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

Note: This procedure is only an example. Configuring a business process to lock solution records varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

To create a business process to lock solution records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, Locking a Solution Record.
   b. In the Object Name field, select Solution from the menu.

      The Transition field automatically displays Status by default.
   c. (Optional) In the Description field, enter a description of the business process.
   d. Click Save.
3. On the Process List page, open the business process (Locking a Solution Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as described in the following table:

State	Disable Update Check Box	Disable Delete/Remove Check Box
Approved **Note:** For the Approved state, add also the following status validation information in the Condition text box: `[<MarketingApproval>]= 'Y' AND [<LegalApproval>]='Y'`.	Selected	Selected
Draft	Not selected	Not selected
Obsolete	Selected	Selected

5. On the Process Detail page in the Transition States section, configure the transition states:
   a. Open the transition state.
   b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

      For example, for the Approved state, select read-only for all fields except the Expiration Date field.
   c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as described in the following table:

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/Remove Check Box
Approved	Books	Not selected	Selected	Selected
	Messaging Plans	Not selected	Selected	Selected
	Messaging Plan Items	Not selected	Selected	Selected
	Messaging Plan Item Relations	Not selected	Selected	Selected
	Related Solutions	Not selected	Selected	Selected
Draft	Books	Selected	Not selected	Not selected
	Messaging Plans	Selected	Not selected	Not selected
	Messaging Plan Items	Selected	Not selected	Not selected
	Messaging Plan Item Relations	Selected	Not selected	Not selected
	Related Solutions	Selected	Not selected	Not selected
Obsolete	Books	Selected	Selected	Selected
	Messaging Plans	Selected	Selected	Selected
	Messaging Plan Items	Selected	Selected	Selected
	Messaging Plan Item Relations	Selected	Selected	Selected
	Related Solutions	Selected	Selected	Selected

d. Click Save.

6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Solution Record State Stage Definitions

The following table describes the state stages for a solution record.

State Stage	Description
Approved	The proposed solution has been approved.
Draft	The proposed solution is in draft status (and has not been approved yet).
Obsolete	The proposed solution is out of date (or invalid).

Creating a Business Process to Lock Validated Address Records

You can configure a business process to lock validated address records in Oracle CRM On Demand Life Sciences Edition so that after an address record is created and validated (the Validated Date field has a date value and the Status field has a value of Validated), it cannot be modified or deleted.

Use the following procedure to create a business process to lock validated address records in Oracle CRM On Demand that satisfy this condition. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

> **Note:** This procedure is only an example. Configuring a business process to lock address records varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

Before you begin. To perform this task, your company profile must include the following settings: Enable Shared Addresses and Validate Shared Addresses. Your user role must include the following privileges: Manage Shared Addresses Access and Validate Shared Addresses.

To create a business process to lock validated address records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:

   a. Enter a name for the process in the Process Name field, for example, Locking a Validated Address Record.
   b. In the Object Name field, select Address from the menu.

      The Transition field automatically displays Validated Status by default.
   c. (Optional) In the Description field, enter a description of the business process.
   d. Click Save.

3. On the Process List page, open the business process (Locking a Validated Address Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as described in the following table:

State	Disable Update Check Box	Disable Delete/Remove Check Box
Validated	Selected	Selected
Not Validated	Not selected	Not selected

5. On the Process Detail page in the Transition States section, configure the transition states:

    a. Open the transition state.
    b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

       For example, for the Validated state, select read-only for all fields.
    c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as described in the following table:

State	Record Type	Disable Create/Add Check Box	Disable Update Check Box	Disable Delete/Remove Check Box
Validated	Audit Trail	Selected	Selected	Selected
Not Validated	Audit Trail	Not selected	Not selected	Not selected

    d. Click Save.
6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Validated Address Record State Stage Definitions

The following table describes the state stages for a validated address record.

State Stage	Description
Validated	The address has been locked.
Not Validated	The address has not been locked.

Creating a Business Process to Lock Sample Request Records

You can configure a business process to lock sample request records so that after a sample request is signed, it cannot be modified. For example, when the sample request status is set to one of the following states:

- **Pending.** You can make all updates to the sample request and the associated sample request items.
- **Signed.** You cannot add any additional sample request items, nor delete any existing sample request items. However, Oracle CRM On Demand can update the sample request item status.
- **Voided.** All sample request items are voided and cannot be changed.

Use the following procedure to create a business process to lock sample request records in Oracle CRM On Demand Life Sciences Edition that satisfy these conditions. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

Note: This procedure is only an example. Configuring a business process to lock sample request records varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

To create a business process to lock sample request records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, Locking a Sample Request Record.
   b. In the Object Name field, select Sample Request from the menu.
      The Transition field automatically displays Status by default.
   c. (Optional) In the Description field, enter a description of the business process.
   d. Click Save.
3. On the Process List page, open the business process (Locking a Sample Request Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as described in the following table.

State	Disable Update Check Box	Disable Delete/Remove Check Box
Pending	Not Selected	Not Selected
Signed	Not selected	Selected
Voided	Selected	Selected

5. On the Process Detail page in the Transition States section, configure the transition states:

a. Open the transition state.
b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

   For the Signed transition state, select read-only for all fields except the Status field.
c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as described in the following table.

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/Remove Check Box
Signed	Sample Request Items	Selected	Not Selected	Selected
Pending	Sample Request Items	Not Selected	Not selected	Not Selected
Voided	Sample Request Items	Selected	Selected	Selected

   The related access control in the previous table prevents the creation, addition or deletion of sample request items while a sample request item is in the Signed state.
d. Click Save.

6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Creating a Business Process to Lock Call Product Detail Records

You can configure a business process to lock call product detail records so that after a product is detailed during a call, it cannot be modified. For example, when the call product detail status is set to one of the following states, the following conditions apply:

- **Pending.** You can update the call product detail record and its associated PCD or SPM records:
  - Call Product Detail Message Response, which you can rename to Call Product Detail Outcome
  - Call Product Detail Messaging Plan, which you can rename to Call Product Detail Call Objective
  - Call Product Detail Messaging Plan Items, which you can rename to Call Product Detail Next Call Objective
- **Signed.** You cannot add any additional PCD or SPM records, nor delete any existing PCD or SPM records. However, Oracle CRM On Demand can update the status on PCD or SPM records.
- **Voided.** All PCD or SPM records are voided, and you cannot change them.

Use the following procedure to create a business process to lock call product detail records in Oracle CRM On Demand Life Sciences Edition that satisfy these conditions. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

Note: This procedure is only an example. Configuring a business process to lock call product detail records varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

To create a business process to lock call product detail records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:

    a. Enter a name for the process in the Process Name field, for example, Locking a Call Product Detail Record.
    b. In the Object Name field, select Call Product Detail from the menu.

       The Transition field automatically displays Status by default.
    c. (Optional) In the Description field, enter a description of the business process.
    d. Click Save.
3. On the Process List page, open the business process (Locking a Call Product Detail Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as described in the following table.

State	Disable Update Check Box	Disable Delete/Remove Check Box
Pending	Not Selected	Not Selected
Signed	Not selected	Selected
Voided	Selected	Selected

5. On the Process Detail page in the Transition States section, configure the transition states:

    a. Open the transition state.
    b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.

       For the Signed transition state, select read-only for all fields except the Status field.
    c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as described in the following table.

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/ Remove Check Box
Signed	Any of the following types: - Call Product Detail Message Response,	Selected	Not Selected	Selected
Pending		Not Selected	Not selected	Not Selected

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/ Remove Check Box
	which you can rename to Call Product Detail Outcome			
Voided	- Call Product Detail Messaging Plan Item, which you can rename to Call Product Detail Call Objective - Call Product Detail Messaging Plan Items, which you can rename to Call Product Detail Next Call Objective	Selected	Selected	Selected

The related access control in the previous table prevents the creation, addition or deletion of SPM records while a sample request item is in the Signed state.

d. Click Save.

6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Creating a Business Process to Lock Sample Disclaimer Records

You can create a business process to lock sample disclaimer records so that when a sample disclaimer has been approved, all fields in the sample disclaimer record are locked (except for the Expiration Date), and you cannot edit or delete the sample disclaimer record.

Use the following procedure to create a business process to lock sample disclaimer records in Oracle CRM On Demand Life Sciences Edition that satisfy this condition. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

> **Note:** This procedure is only an example. Configuring a business process to lock sample disclaimer records varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

To create a business process to lock sample disclaimer records in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:

   a. Enter a name for the process in the Process Name field, for example, Locking a Sample Disclaimer Record.

   b. In the Object Name field, select Sample Disclaimer from the menu.

      The Transition field automatically displays Status by default.

   c. (Optional) In the Description field, enter a description of the business process.

   d. Click Save.
3. On the Process List page, open the business process (Locking a Sample Disclaimer Record) that you just created.
4. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the business process as described in the following table.

State	Disable Update Check Box	Disable Delete/Remove Check Box
Active	Selected	Selected
Expired	Selected	Selected
Inactive	Not Selected	Not Selected

5. On the Process Detail page in the Transition States section, configure the transition states:
   a. Open the transition state.
   b. (Optional) On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, select the read-only check box for the fields as required, then click Save.
   c. On the Transition State Detail page, click Add in the Related Access Control section, then add the related access controls for the transition state as described in the following table.

State	Record Type	Disable Create/ Add Check Box	Disable Update Check Box	Disable Delete/ Remove Check Box
Active	Related Disclaimer	Selected	Selected	Selected
Expired	Related Disclaimer	Selected	Selected	Selected
Inactive	Related Disclaimer	Not Selected	Not Selected	Not Selected

   d. Click Save.
6. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

Creating a Business Process to Lock Records in General

You can create a business process to lock the following record types in general in Oracle CRM On Demand Life Sciences Edition so that when the status of the record changes to a given value, the record and all associated child records are locked; that is, you cannot delete or modify them:

- Account
- Business Plan

- Event
- Lead
- Objective
- Opportunity
- Service Request

For example, you can create conditions similar to the following to apply to these record types:

- When record type status is set to one of the following, you can add, update, and delete records as required: Active, Current, Qualifying, or Pending.
- When record type status is set to one of the following, you cannot add, update, or delete records because the records are locked: Inactive, Final Approved, Qualified, Won, or Open.
- When record type status is set to one of the following, you cannot delete the records or update certain fields in the record because they are locked: Closed, Submitted, Converted, or Lost.

Use the following procedure to create a business process to lock records in Oracle CRM On Demand Life Sciences Edition that satisfy these conditions. This task is a step in *Setting Up Business Processes to Lock Records in Oracle CRM On Demand Life Sciences Edition*.

> **Note:** This procedure is only an example. Configuring a business process to records in general varies according to Oracle CRM On Demand installation, and depends on the customer's business rules for locking data.

To create a business process to lock records in general in Oracle CRM On Demand Life Sciences Edition

1. In Oracle CRM On Demand, click the Admin link, and then click Process Administration.
2. Click New on the Process List page and on the Process Edit page:
   a. Enter a name for the process in the Process Name field, for example, Locking XYZ Record, where XYZ is one of the following:
      - Account
      - Business Plan
      - Event
      - Lead
      - Objective
      - Opportunity
      - Service Request

   b. In the Object Name field, select XYZ from the menu.

      The Transition field automatically displays Status by default.

   c. (Optional) In the Description field, enter a description of the business process.
3. Click Save.
4. On the Process List page, open the business process (Locking XYZ Record) that you just created.
5. On the Process Detail page, click Add in the Transition States section, and set up the transition states for the record type accordingly.

   For example, the following table shows some transition states.

Record Type	State	Disable Update Check Box	Disable Delete/Remove Check Box
Account	Active	Not selected	Not selected
	Inactive	Not selected	Selected
	Closed	Selected	Selected
Business Plan	Current	Not selected	Not selected
	Final Approved	Not selected	Selected
	Submitted	Selected	Selected
Event	Active	Not selected	Not selected
	Cancelled	Not selected	Not selected
	In Progress	Not selected	Not selected
	Inactive	Not selected	Not selected
	Planned	Not selected	Not selected
	Completed	Selected	Selected
Lead	Qualifying	Not selected	Not selected
	Qualified	Not selected	Selected
	Converted	Selected	Selected
Objective	Current	Not selected	Not selected
	Final Approved	Not selected	Selected

Record Type	State	Disable Update Check Box	Disable Delete/Remove Check Box
	Submitted	Selected	Selected
Opportunity	Pending	Not selected	Not selected
	Won	Not selected	Selected
	Lost	Selected	Selected
Service Request	Pending	Not selected	Not selected
	Open	Not selected	Selected
	Closed	Selected	Selected

6. On the Process Detail page in the Transition States section, configure the transition states:

   a. Open the transition state.
   b. On the Transition State Detail page, click Add in the Field Setup section, add the required fields for the transition state, then select the read-only check box for the fields as required. For example:

      - For the following transition states, all fields must be available for update so do not select read-only for any fields: Active, Current, Qualifying, or Pending.
      - For the following transition states, select read-only for some fields but not for fields that must be available for update: Inactive, Final Approved, Qualified, Won, or Open.
      - For the following transition states, all fields must be locked so select read-only for all fields that you add: Closed, Submitted, Converted, or Lost.

   c. On the Transition State Detail page, click Add in the Related Access Control section, and add the access control for the transition state as required for related record types.

   The following table shows the access controls for some transition states for several related record types. These states are for the related record types that appear in the Related Access Control Edit page. For example, to set up the related type access controls for the Business Plan parent record type for the Closed transition state, you select a related record, such as Account Team from the Record Type* picklist, and set the three check boxes to Selected according to the table.

Related Record Type	State	Disable Create/Add Check Box	Disable Update Check Box	Disable Delete/Remove Check Box
Business Plan	Current	Not selected	Not selected	Not selected
	Final Approved	Not selected	Not selected	Selected

Related Record Type	State	Disable Create/Add Check Box	Disable Update Check Box	Disable Delete/Remove Check Box
	Submitted	Selected	Selected	Selected
Contact	Active	Not selected	Not selected	Not selected
	Inactive	Not selected	Not selected	Selected
	Closed	Selected	Selected	Selected
Lead	Qualifying	Not selected	Not selected	Not selected
	Qualified	Not selected	Not selected	Selected
	Converted	Selected	Selected	Selected
Objective	Current	Not selected	Not selected	Not selected
	Final Approved	Not selected	Not selected	Selected
	Submitted	Selected	Selected	Selected
Opportunity	Pending	Not selected	Not selected	Not selected
	Won	Not selected	Not selected	Selected
	Lost	Selected	Selected	Selected
Service Request	Pending	Not selected	Not selected	Not selected
	Open	Not selected	Not selected	Selected
	Closed	Selected	Selected	Selected

d. Click Save.

7. Sign out of Oracle CRM On Demand, and then sign in again for the changes to take effect.

8 Data Loading

Data Loading

This chapter describes how to load the seed data for Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

- *About Importing Data into Oracle CRM On Demand*
- *Process of Loading the Seed Data*

About Importing Data into Oracle CRM On Demand

Proper planning is required to verify a successful data import into Oracle CRM On Demand and corresponding industry editions. Before you begin to import your data, it is recommended that you:

- Contact Customer Care to begin planning your import.
- Review the topics about preparing for data importing, importing your data, data checking guidelines, and content management in *Oracle CRM On Demand Online Help* .
- Prepare your comma-separated value (CSV) files and add any necessary fields or picklist values to your Oracle CRM On Demand application.
- Test your import with a small amount of data first, before performing a full data import.

You can create an inventory period manually, or using the import functionality in Oracle CRM On Demand Life Sciences Edition. Typically, inventory periods for users are populated using the import functionality when Oracle CRM On Demand Life Sciences Edition is first set up for a company.

For adding multiple product categories, products, sample lots, users, allocations, and sample inventory records, it is recommended that you create an import file (in CSV format), and then ask your company administrator to load the data into the inventory period.

Import the seed data for Oracle CRM On Demand Life Sciences Edition in the following order:

- Product Categories
- Products
- Sample Lots
- Users
- Inventory Periods
- Allocations
- Sample Inventory
- HCP Contact Allocation

For information about preparing the fields of your seed data for data import, see the topics about import preparation in *Oracle CRM On Demand Online Help* .

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Process of Loading the Seed Data

The last step in *Roadmap for Configuring Oracle CRM On Demand Life Sciences Edition* is to load the seed data for product categories, products, sample lots, users, inventory periods, allocations, sample inventories, and optionally, HCP contact allocations. Use the following procedure to load the seed data for Oracle CRM On Demand Life Sciences Edition.

To load the seed data for Oracle CRM On Demand Life Sciences Edition

1. If you have a small number of products and product categories, then do the following:
    a. Set up product categories for Oracle CRM On Demand Life Sciences Edition.

        For more information about setting up product categories for Oracle CRM On Demand Life Sciences Edition, see *Oracle CRM On Demand Online Help* .
    b. Set up products for Oracle CRM On Demand Life Sciences Edition.

        For example, for all products that sales representatives will be dropping as samples, define the product type as Sample. For all products that will be detailed at a brand level, create a product with a brand name and set the type to Detail.

        For more information about setting up company products for Oracle CRM On Demand Life Sciences Edition, see *Oracle CRM On Demand Online Help* .

    If you have a large number of products and product categories, then import them as described in Step 5.
2. Confirm that Customer Care has provisioned your company to use Oracle CRM On Demand Life Sciences Edition.

    For more information, see *About Provisioning Oracle CRM On Demand Life Sciences Edition*.
3. If not already done, then set up life sciences roles, record type access for each role, and assign privileges accordingly.

    For more information, see *Setting Up Access Profiles and the Order Usage Option*.
4. Prepare your CSV files and add any necessary fields or picklist values to the Oracle CRM On Demand application.

    For information about preparing the fields of your seed data for data import, see the topics about import preparation in *Oracle CRM On Demand Online Help* .
5. Import the seed data for Oracle CRM On Demand Life Sciences Edition in the following order:
    - Product Categories
    - Products
    - Sample Lots
    - Users
    - Inventory Periods
    - Allocations
    - Sample Inventory
    - HCP Contact Allocations

For more information about importing seed data, see the topic about importing your data in *Oracle CRM On Demand Online Help* .

9 Setting Up Custom Objects

Setting Up Custom Objects

This chapter describes how to set up custom objects for Oracle CRM On Demand Life Sciences Edition. It includes the following topics:

- *About Custom Objects*
- *Configuring Custom Objects for Oracle CRM On Demand Life Sciences Edition*

About Custom Objects

Most record types are provisioned for you when Customer Care sets up your company to use Oracle CRM On Demand Life Sciences Edition. For more information, see *Record Types for Oracle CRM On Demand Life Sciences Edition*. Custom objects are record types that you can use to meet your own specialized business requirements, for example, for business functionality that is not provided directly by Oracle CRM On Demand. Custom objects 01 through 10, (Custom Object 01-10) are provisioned by default. Additional custom object record types (Custom Object 11-15), must be provisioned for your company by Customer Care before you can configure them for Oracle CRM On Demand Life Sciences Edition.

> **Note:** Provisioning of more than 15 custom objects (up to a maximum of 40 objects) requires special permission. Contact Customer Care for more information.

Custom Objects 01, 02, and 03 have individual privileges. The privileges for the remaining custom objects are grouped. There is a privilege for Custom Objects 04 through 10, a privilege for Custom Objects 11 through 15, and so on.

In Oracle CRM On Demand Life Sciences Edition, you can use custom objects with the following record types:

- Account
- Activity
- Address
- Allocation
- Business Plan
- Contact
- Contact Best Time
- Contact State License
- Event
- HCP Contact Allocation
- Inventory Audit Report
- Inventory Period

- Messaging Plan
- Messaging Plan Item
- Messaging Plan Item Relations
- Message Response
- Objective
- Order
- Order Item
- Plan Accounts
- Plan Contact
- Plan Opportunity
- Sample Disclaimer
- Sample Inventory
- Sample Lot
- Sample Transaction
- Signature
- Smart Call
- Solution
- Transaction Item

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

Configuring Custom Objects for Oracle CRM On Demand Life Sciences Edition

Use the following procedure to configure a custom object for a role in Oracle CRM On Demand Life Sciences Edition.

To configure Custom Object N for Oracle CRM On Demand Life Sciences Edition

1. Enable the privilege for each of the custom objects required, if the privileges are not already enabled for your company.

   > **Note:** Customer Care performs this task.

2. Configure the field setup for Custom Object N.

   For example, configure the field setup for Custom Object 01 as follows:

   a. In Oracle CRM On Demand, click Admin, and then Application Customization.
   b. In the Record Type Setup section, click Custom Object 01.

   c. In the Field Management section, click the Custom Object 01 Field Setup link.
   d. On the Custom Object 01 Fields page, click New Field, Manage Field Labels, the Edit link or the Edit Picklist link, as necessary, and configure the fields as required to support your business processes. For example:

      - To configure Custom Object 01 for Business Plan, then you must set up the Business Plan field on the Custom Object 01 Fields page.
      - To configure Custom Object 01 for Objective, then you must set up the Objective field on the Custom Object 01 Fields page.

   For more information about configuring fields, see *Configuring the Fields for Oracle CRM On Demand Life Sciences Edition*.
3. Configure a page layout for Custom Object N.

   For instructions on configuring page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*.
4. Display Custom Object N as a Related Information section on the appropriate record type page layout that you want to establish a relationship between.

   For example:

   - If configuring Custom Object 01 for Business Plan, then configure LS Business Plan Page Layout to display Custom Object 01 as a related information section.
   - If configuring Custom Object 01 for Objective, then configure LS Objective Page Layout to display Custom Object 01 as a related information section.

   For information about configuring page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition* and *Page Layout Configurations for the LS Field Sales Rep Role*.
5. Configure the access level for the related Custom Object N.

   For more information, see *Setting Up Access Profiles for Life Sciences Roles* and *Access Levels for the LS Field Sales Rep Role*.

10 Configuring Key Accounts

Configuring Key Accounts

This chapter describes how to set up key account management for business planning, budgeting, and marketing. It includes the following topics:

- *About Key Account Management*
- *Restrictions on Configuring Key Account Management Record Types*
- *Process of Configuring Key Account Management Record Types*

About Key Account Management

Oracle CRM On Demand Life Sciences Edition provides an integrated solution for business planning, budgeting, and marketing, so that pharmaceutical sales representatives can manage event budgets, fund requests, market development funds, and associated costs. It provides the following marketing record types:

- **Activity.** You can use this record type to review, create, and update your activities and to review and update your planned calls.
- **Business Plan.** You can use this record type to set the overall budget by region.
- **Campaign.** You can use this record type to create, update, and track campaigns.
- **Event.** You can use this record type to plan and track events such as sales events or educational events.
- **Fund.** You can use this record type to track budget allocations and usage.
- **Fund Request.** You can use this record type to manage budget-approval requests.
- **MDF Request.** You can use this record type to make marketing development funds (MDF) available to partners for the purpose of selling products in a specific geographical area.
- **Messaging Plan.** You can use this record type to create, update, and track messaging plans.
- **Objective.** You can use this record type to create, update, and track objectives for business plans.
- **Order.** You can use this record type to create, update, and track orders and associated order items for products.
- **Sample Request.** You can use this record type to create, update, and track orders and associated sample requests.

To use key account management, you must configure certain record types correctly, see *Process of Configuring Key Account Management Record Types*.

Restrictions on Configuring Key Account Management Record Types

Before you start configuring the key planning and marketing record types for key account management, note the following restrictions:

- You can associate a business plan with several messaging plans and events.
- You can associate a campaign with an objective and several events.
- You can associate an event and an objective with only one fund.
- You can associate a fund request with several activities.

To use key account management, you must configure certain record types correctly, see *Process of Configuring Key Account Management Record Types*.

Process of Configuring Key Account Management Record Types

You must configure certain key planning and marketing record types in Oracle CRM On Demand Life Sciences Edition so that they are linked to or can be associated with each other to provide an integrated solution for business planning, budgeting, and marketing. For information on the restrictions, see *Restrictions on Configuring Key Account Management Record Types*.

To configure key account management record types for Oracle CRM On Demand Life Sciences Edition, perform the following tasks:

1. Set up the workflow rules that will trigger integration events for the following key business planning, budgeting, and marketing record types as required:
    - Activity
    - Business Plan
    - Campaigns
    - Event
    - Fund
    - Fund Request
    - MDF Request
    - Messaging Plan
    - Objective
    - Order
    - Sample Request

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

2. Make sure that the key business planning, budgeting, and marketing record types are added to or can be displayed on the appropriate page layouts, as described in the following table. For example, do the following:

   - Link events to business plans, campaign, market development fund request, and objective.
   - Link an activity to a fund and fund request, and so on.

   For more information about configuring page layouts, see *Setting Up Page Layouts for Oracle CRM On Demand Life Sciences Edition*.

Record Type	Page Layout	Displayed Information	Comment
Activity	You can use the following page layouts: ◦ LS Account Call Page Layout ◦ LS Attendee Call Page Layout ◦ LS Contact Call Page Layout	Fund Request	You can associate many activities with each displayed record type. For example, you can associate more than one activity with a fund request, order, and so on.
		Order	
		Sample Request	
Business Plan	LS Business Plan Page Layout	Event	You can associate a business plan with more than one event.
		Messaging Plan	You can associate a business plan with more than one messaging plan.
Campaign	LS Campaign Page Layout	Event	You can associate a campaign with more than one event.
Event	LS Event Page Layout	MDF Request	You can associate an event with only one market development fund request.
		Business Plan	You can associate many events with a business plan.
		Campaign	You can associate many events with a campaign.
		Objective	You can associate many events with an objective.

Record Type	Page Layout	Displayed Information	Comment
Fund	LS Fund Page Layout	Activity	You can associate a fund with more than one activity.
Fund Request	LS Fund Request Page Layout	Activity	You can associate a fund request with more than one activity.
MDF Request	LS MDF Request Page Layout	Event	You can associate only one market development fund request with an event.
		Objective	You can associate many market development fund requests with an objective.
Messaging Plan	LS Messaging Plan Page Layout	Business Plan	You can associate many messaging plans with a business plan.
Objective	LS Objective Page Layout	Event	You can associate an objective with more than one event.
		MDF Request	You can associate an objective with more than one market development fund request.