

# Oracle CRM On Demand

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**Oracle Migration Tool On Demand  
Guide Release 43**

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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.

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# 1 What's New in This Release

## What's New in Oracle Migration Tool On Demand Guide, Release 43

The following table lists the changes that were made in this version of the documentation to support Release 43 of the software.

Topic	Description
<i>Oracle Migration Tool On Demand Client</i>	Modified topic. Client side extensions and process administration transition states have been added to the list of features for which you can extract and import configuration data.
<i>Privileges for Administrators</i>	Modified topic. The table of privileges has been updated to include the privileges required for migrating client side extensions and process administration transition states.
<i>Migration Dependencies</i>	Modified topic. The dependency information for migrating process administration transition states has been added.
<i>Commands for Oracle Migration Tool On Demand</i>	Modified topic. Process administration transition states have been added to the list of features that support the Delete command.
<i>Location of Output XML Files for Read and ReadAll Commands</i>	Modified topic. Details of the folder names for client side extensions and process administration transition states have been added.
<i>Migrating the Configuration Data</i>	Modified topic. In step 2 of the procedure to back up the configuration data from the target environment, commands have been added to back up the configuration data for client side extensions and process administration transition states.
<i>Elements and Sections in the Related Information Layout XML Output File</i>	Modified topic. The description of the <SortField> element has been updated.
<i>Support for the Sort Feature in Related Information Sections</i>	New topic. The ability to specify a sort field and sort order is now supported for a number of additional related information sections.
<i>Access Profiles</i>	Modified topic. A new optional parameter, sortspec, allows you to sort the access objects in the output from the Read AccessProfile and ReadAll AccessProfile commands by access object name, in ascending or descending order.
<i>Extracting a Single Access Profile</i> <i>Extracting All Access Profiles</i>	Modified topics. Examples of using the new sortspec parameter with the Read and ReadAll commands for access profiles have been added.
<i>Dynamic Page Layouts</i>	Modified topic. A new optional parameter, sortspec, allows you to:

Topic	Description
	<ul style="list-style-type: none"> <li>Sort the dynamic layouts in the output from the Read DynamicLayout and ReadAll DynamicLayout commands by dynamic layout name, in ascending or descending order.</li> <li>Sort the picklist values in the output from the Read DynamicLayout and ReadAll DynamicLayout commands by picklist value name, in ascending or descending order.</li> </ul>
<p><i>Extracting Dynamic Page Layouts for a Single Object</i></p> <p><i>Extracting Dynamic Page Layouts for All Objects</i></p>	<p>Modified topics. Examples of using the new sortspec parameter with the Read and ReadAll commands for dynamic layouts have been added.</p>
<p><i>Elements and Sections in the Search Layout XML Output File</i></p>	<p>Modified topic. You can now specify a filter condition for each search field in a search layout.</p>
<p><i>Process Administration Transition States</i></p> <p><i>Privileges Required for Migrating Process Administration Transition States</i></p> <p><i>Elements and Sections in the Process Administration Transition States XML Output File</i></p> <p><i>Migrating Process Administration Transition States</i></p> <p><i>Extracting a Single Transition State or All Transition States for a Process</i></p> <p><i>Extracting All Transition States</i></p> <p><i>Updating or Inserting a Transition State (Upsert)</i></p> <p><i>Deleting a Transition State</i></p>	<p>New topics. They describe how to migrate process administration transition states, including the field setup and related access control configuration on the transition states, from a source environment to a target environment.</p>
<p><i>Migrating Client Side Extensions</i></p>	<p>New chapter. It describes how to migrate client side extensions.</p>
<p><i>Replicating All Configuration Data from a Source Environment to a Target Environment</i></p> <p><i>Replicating Selective Configuration Data from a Source Environment to a Target Environment</i></p>	<p>Modified topics. The procedures have been updated to include examples of the commands for replicating the configuration data for client side extensions and process administration transition states.</p>



# 2 Getting Started with Oracle Migration Tool On Demand

## Getting Started with Oracle Migration Tool On Demand

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

- *Oracle Migration Tool On Demand Client*
- *Software Requirements for Installing the Oracle Migration Tool On Demand Client*
- *Downloading the Oracle Migration Tool On Demand Client*
- *Installing the Oracle Migration Tool On Demand Client*
- *Starting the Oracle Migration Tool On Demand Client Graphical User Interface*
- *Starting the Oracle Migration Tool On Demand Client Command-Line Interface*
- *Migration Dependencies*
- *Commands for Oracle Migration Tool On Demand*
- *Specifying Internet Proxy Server Information*
- *XML Templates and Web Services Description Language*
- *Considerations for Using the Oracle Migration Tool On Demand Client*

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

## Oracle Migration Tool On Demand Client

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

You can extract and import configuration data for the following features:

- Access profiles
- Action bar layouts
- Assignment rule groups

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

The Oracle Migration Tool On Demand client comes with two interfaces: a command-line interface and a graphical user interface (GUI). If you want to migrate all of the configuration data, or all of the configuration data for one or more features (for example, all access profile configuration data), and if you do not want to make any changes to the data, then it is recommended that you use the GUI to migrate your data. However, if you want to download configuration data and make changes to it before you upload it to another environment, then you must use the command-line interface. Similarly, if you want to download and then upload a subset of the configuration data for a feature, such as a single access profile or the search layouts for a single record type, then you must use the command-line interface.

Your ability to perform tasks through the Oracle Migration Tool On Demand client is subject to the same restrictions as your ability to perform the same tasks in the Oracle CRM On Demand user interface. Typically, if you are not able

to perform a task in the user interface, then you cannot perform the equivalent task in the Oracle Migration Tool On Demand client, for example, delete an access profile, edit a field type, and so on.

Oracle CRM On Demand verifies that you are using the latest version of the client. If you run a command on the Oracle CRM On Demand server using an unsupported version of the Oracle Migration Tool On Demand client, then you are prompted to download the latest version of the client.

Similarly, if you attempt to use an unsupported version of the GUI to migrate your configuration data, then you are prompted to download the latest version of the client from Oracle CRM On Demand. A link to the page where you can access the client is included in the error message.

When you download the Oracle Migration Tool On Demand client from an Oracle CRM On Demand environment, a version argument with a value that corresponds to the release of Oracle CRM On Demand that is running on that environment is applied to all of your requests by default. So, the configuration data that is returned by the Oracle Migration Tool On Demand client reflects the configuration data that is available in that version of Oracle CRM On Demand. For example, if you download the Oracle Migration Tool On Demand client from an environment that is running Release 43 of Oracle CRM On Demand, then the configuration data that is returned for your requests is the configuration data that is available in Release 43 of Oracle CRM On Demand.

## Auditing and Log Files

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

You can view the log files for the operations that you perform in the Oracle Migration Tool On Demand client on your local machine.

The log files that are generated for operations that you perform through the command-line interface are placed in a log directory under the directory where the MigrationTool.bat file is located, unless you set the `outputDir` parameter to specify a different location. If your computer uses a Windows operating system, then the path to the default log directory is as follows:

```
Installation_Directory\windows\log
```

If your computer uses an operating system other than a Windows operating system, then the path to the default log directory is as follows:

```
Installation_Directory/other/MigrationTool/log
```

In the directory path, *Installation\_Directory* is the name of the directory where the Oracle Migration Tool On Demand ZIP file was unzipped.

The log files that are generated when you migrate configuration data through the GUI of the Oracle Migration Tool On Demand client are placed in the directory that is selected for the log files when you set up the migration job.

## Supported Operating Systems for Oracle Migration Tool On Demand

The Oracle Migration Tool On Demand client is supported on all operating systems that are supported by Java.

## Supported Releases of Oracle CRM On Demand

The Oracle Migration Tool On Demand client supports exporting and importing configuration data between any two Oracle CRM On Demand tenants on the same release (for example, two Release 43 tenants). In addition, the version of the Oracle Migration Tool On Demand client you are using must be the same as the release of Oracle CRM On Demand with which you are working (for example, you cannot use the current version of the Oracle Migration Tool On Demand client on a previous release of Oracle CRM On Demand).

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

## Software Requirements for Installing the Oracle Migration Tool On Demand Client

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

- A ZIP utility (for example, WINZIP) to extract the files to your computer
- If your computer uses any operating system other than a Windows operating system, then:
  - To use the GUI of the Oracle Migration Tool On Demand client, Java 8 or higher and JavaFX must be installed on your computer.
  - To use the command-line interface of the Oracle Migration Tool On Demand client, Java Runtime Environment (JRE) JRE 1.7.0\_131 or later must be installed on your computer.

You must make sure that you have the correct version of Java and JRE installed on your computer.

**Note:** To use either the GUI or the command-line interface of the Oracle Migration Tool On Demand client GUI on a Windows operating system, you do not need to have Java installed on your computer.

## Privileges for Administrators

The following table shows the privileges that are required to use the Oracle Migration Tool On Demand client to extract, insert, and update the configuration data for various Oracle CRM On Demand features. Typically, only users who are administrators are given the necessary privileges to insert or update configuration data.

In addition to the privileges shown in the following table, users require the Data Management: Import privilege and the Data Management: Export privilege to download the Oracle Migration Tool On Demand client. Also, Web services must be set up on Oracle CRM On Demand. For more information about Web services, see *Oracle Web Services On Demand Guide*, available from the Oracle CRM On Demand documentation library in Oracle Help Center and from the Oracle CRM On Demand application by clicking Admin, Web Services Administration, and then Download Documentation.

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

Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
Access Profiles	<ul style="list-style-type: none"> <li>Enable Web Services Access</li> <li>Manage Roles and Access</li> </ul>	Manage Object Access for custom objects (record types) that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Action Bars	<ul style="list-style-type: none"> <li>Enable Web Services Access</li> <li>Customize Application</li> </ul>	None	None
Assignment Rule Groups and Assignment Rules	<ul style="list-style-type: none"> <li>Enable Web Services Access</li> <li>Data Rules and Assignment</li> </ul>	None	None
Cascading Picklists	<ul style="list-style-type: none"> <li>Enable Web Services Access</li> <li>Customize Application</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	Cascading picklists must be supported by the object.
Client Side Extensions	<ul style="list-style-type: none"> <li>Enable Web Services Access</li> <li>Upload Client Side Extensions and Manage Custom HTML Head Tag</li> </ul>	None	None
Concatenated Fields	<ul style="list-style-type: none"> <li>Enable Web Services Access</li> <li>Customize Application</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Custom Fields (Field Management)	<ul style="list-style-type: none"> <li>Enable Web Services Access</li> <li>Customize Application</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	See <i>Additional Notes and Requirements</i>
<p><b>Additional Notes and Requirements:</b></p> <ul style="list-style-type: none"> <li>Field Management must be supported for the object.</li> <li>The object must be set up for field renaming, if the operation is Upsert.</li> <li>The object must be set up for new fields, if the operation is Create.</li> <li>Advanced Field Management must be set up if the &lt;ValidationErrorMsg&gt;, &lt;ValidationExpression&gt;, or &lt;PostDefault&gt; elements are modified.</li> <li>The Integration Tag can be changed only if renaming is allowed on that object.</li> <li>A multi-select picklist can be created or updated only if it is set up for the object.</li> </ul>			

Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
Customized Record Types	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Custom HTML Head Tag Additions	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Upload Client Side Extensions and Manage Custom HTML Head Tag</li> </ul>	None	None
Custom Web Applets	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Custom Web Applets</li> <li>• Customize Application</li> </ul>	Detail page custom Web applets and homepage custom Web applets require Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Custom Web Links	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Custom Web Tab	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> <li>• Manage Roles and Access (for Read operations only)</li> </ul>	None	None
Dynamic Page Layouts	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application - Manage Dynamic Layout</li> </ul>	None	None
Field Audit Setup	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Administer Field Audit</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Homepages	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> <li>• Customize Application - Manage Homepage Customizations</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Integration Event Queues	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Integration Event Queues</li> </ul>	None	None

Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
Lead Conversion Mappings	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Data Rules and Assignment.</li> <li>• Manage PRM Access (for mappings for the Deal Registration record type only)</li> </ul>	None	None
List Access and Order Layouts	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> <li>• Manage Public Lists</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Modification Tracking Settings (Enable Modification Tracking)	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Modification Tracking</li> <li>• Manage Roles and Access</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	No
Page Layouts	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> </ul>	None	None
Picklists	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	Field management must be supported by the object.
Picklist Value Group	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> </ul>	None	None
Process Administration and Process Administration Transition States	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Process Administration</li> </ul>	None	None
Related Information Layouts	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Role Associations for Analytics Folders (Report Folders)	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Roles and Access</li> <li>• Manage Custom Reports (to extract or update role</li> </ul>	None	The Access Migrated Company Wide Shared Folder privilege is required only if you want to extract, update, or insert role associations for the

Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
	<ul style="list-style-type: none"> <li>associations for folders containing analyses)</li> <li>• Manage Dashboards (to extract or update role associations for folders under the predefined Dashboards folder)</li> <li>• Access Migrated Company Wide Shared Folder</li> </ul>		folders in the Migrated Company Wide Shared Folder.
Roles	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Roles and Access</li> <li>• Manage Company</li> </ul>	None	The Manage Company privilege is required only if you want to update the <ExpirePasswordIn> element.
Sales Assessment Templates	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Assessments Access</li> <li>• Manage Content</li> </ul>	None	None
Sales Categories	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Data Rules - Manage Sales Stage Definition</li> </ul>	None	None
Sales Processes	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Data Rules - Manage Sales Stage Definition (for Upsert operations only)</li> </ul>	None	None
Sales Stages	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Manage Data Rules - Manage Sales Stage Definition (for Upsert operations only)</li> </ul>	None	None
Search Layouts	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> <li>• Customize Application</li> </ul>	Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.	None
Workflow Rules and Actions	<ul style="list-style-type: none"> <li>• Enable Web Services Access</li> </ul>	None	None



Feature Name	User Level Privileges	Object Level Privileges	Additional Notes
	<ul style="list-style-type: none"> <li>Manage Data Rules - Manage Workflow Rules</li> <li>Manage Data Rules - Manage Workflow Rules for Users</li> <li>Workflow Cancel Save</li> </ul>		
Workflow User sets	<ul style="list-style-type: none"> <li>Enable Web Services Access</li> <li>Manage Data Rules - Manage Workflow Rules</li> </ul>	None	None

## Privileges for Nonadministrative Users

Users who have the Enable Web Services Access privilege in their role can use either the command-line interface or the GUI of the Oracle Migration Tool On Demand client to extract the configuration data for certain features. However, the Enable Web Services Access privilege on its own does not allow a user to customize any configuration data using the client, or to upload configuration data to a target environment. Therefore, a user who has the Enable Web Services Access privilege on its own can run commands to extract the configuration data in the command-line interface, and can also use the GUI to extract the configuration data, but any commands that the user attempts to run to upload configuration data fail. Similarly, if the user uses the GUI, then the `upload` commands that the Oracle Migration Tool On Demand client attempts to run to upload the XML files that were downloaded by the `readAll` commands fail.

The following table shows the features for which users can extract configuration data if their role has the Enable Web Services Access privilege, even if their role does not include any other administrator privileges.

**Note:** Users can use the `read` and `readAll` commands to extract client side extension configuration data even if they do not have the Enable Web Services Access privilege.

Feature Name	Commands
Cascading Picklists	Read and ReadAll
Concatenated Fields	Read and ReadAll
Customized Record Types	Read and ReadAll
Custom Web Applets	Read and ReadAll
Dynamic Page Layout	Read and ReadAll
Custom Fields (Field Management)	Read and ReadAll
Integration Event Queues	Read and ReadAll

Feature Name	Commands
Page Layout Fields	ReadAll
Page Layout Related Information	ReadAll
Page Layout Sections	ReadAll
Picklists	Read and ReadAll
Picklist Value Groups	Read and ReadAll
Related Information Layouts	Read and ReadAll
Sales Processes	Read and ReadAll
Sales Stages	Read and ReadAll
Workflow Rules and Actions	Read and ReadAll

**Note:** To download the Oracle Migration Tool On Demand client, users require the Admin Import privilege and the Admin Export privilege.

## Language Considerations When Migrating Configuration Data

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

# Downloading the Oracle Migration Tool On Demand Client

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

- Data Management: Export
- Data Management: Import

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

## To download the Oracle Migration Tool On Demand client

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

```
C:\Oracle Migration Tool On Demand
```

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

# Installing the Oracle Migration Tool On Demand Client

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

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

## To install the Oracle Migration Tool On Demand client

- Extract the contents of the Oracle Migration Tool On Demand ZIP file in the directory that you created in Step 1 of the procedure in *Downloading the Oracle Migration Tool On Demand Client*. For example:

```
C:\Oracle Migration Tool On Demand
```

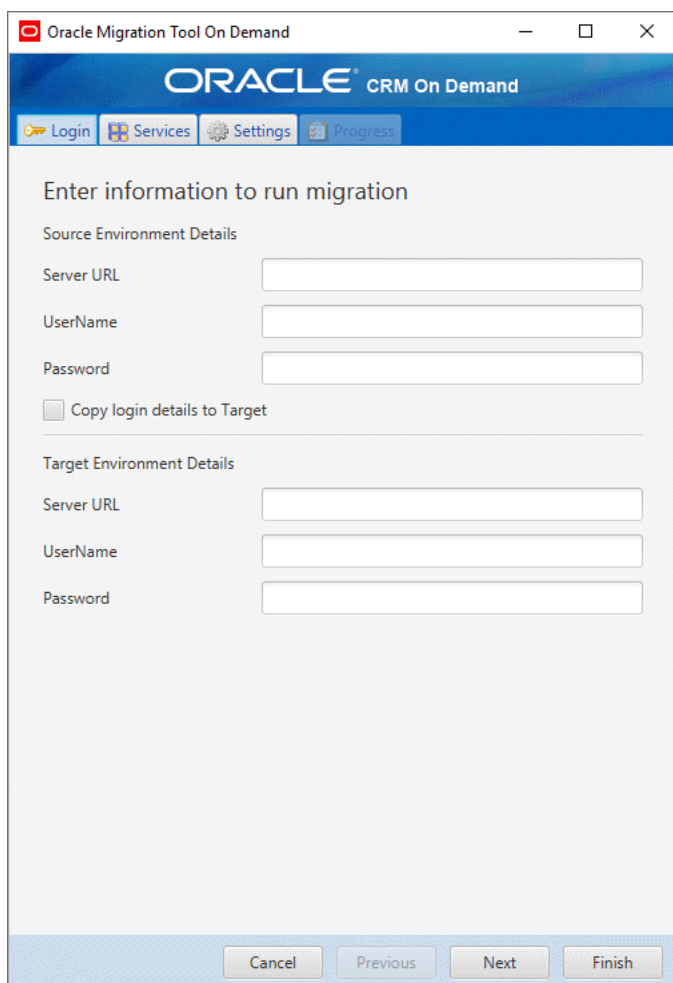
# Starting the Oracle Migration Tool On Demand Client Graphical User Interface

The following procedure describes how to start the Oracle Migration Tool On Demand client GUI.

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

- In the directory where you unzipped the Oracle Migration Tool On Demand ZIP file, perform the appropriate step for the operating system of your computer, as follows:
  - For a Windows operating system, open the directory named windows and then double-click the UIMigrationTool.bat file.
  - For any operating system other than a Windows operating system, open the directory named other, then open the UIMigrationTool subdirectory, and then double-click the UIMigrationTool.jar file.

The following image shows the GUI of the Oracle Migration Tool On Demand client.



For information about using the Oracle Migration Tool On Demand client GUI to migrate your configuration data, see [Migrating Configuration Data Using the Graphical User Interface](#).

## Starting the Oracle Migration Tool On Demand Client Command-Line Interface

The following procedure describes how to start the Oracle Migration Tool On Demand client command-line interface.

### To start the Oracle Migration Tool On Demand client command-line interface

1. Open a command-line prompt.
2. Navigate to the directory where the MigrationTool.bat file for the operating system for your computer is located, as follows:

- o For a Windows operating system:

```
Installation_Directory\windows
```

- o For any operating system other than a Windows operating system:

```
Installation_Directory/other/MigrationTool
```

In the directory path, *Installation\_Directory* is the name of the directory where the Oracle Migration Tool On Demand ZIP file was unzipped.

3. Use the MigrationTool.bat file to run the commands from the command line.

The syntax is as follows:

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

where:

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

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

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

This parameter is optional. If you do not specify this parameter, then the Oracle Migration Tool On Demand client stores the log file in the default location, see [Auditing and Log Files](#).

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

**Note:** The detailed syntax for running Oracle Migration Tool for each specific type of configuration data that you are migrating is provided in the chapter corresponding to that configuration data. For example, to migrate access profiles, see *Migrating Access Profiles*. It is recommended that you refer to the examples in each chapter that correspond to the configuration data that you are migrating.

- o [*Parm1*] [*Parm2*] [*Parm3*] are optional parameters, for example -proxyserver to specify a proxy server and -proxid to specify the proxy server user ID. For more information about specifying proxy servers, see *Specifying Internet Proxy Server Information*.

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

## Migration Dependencies

Due to dependencies between certain features, you must migrate the configuration data for some features before or after the configuration data for other features. The following table shows a recommended sequence based on the dependencies.

Feature Name	Dependencies	For More Information
Customized Record Types	Must be migrated before fields.	<i>Migrating Customized Record Types</i>
Custom Web Tabs	Must be migrated before page layouts.	<i>Migrating Custom Web Tabs</i>
Custom Fields	Must be migrated before action bar layouts, page layouts, lead conversion mappings, and process administration transition states.	<i>Migrating Custom Fields</i>
Picklist Values	Must be migrated after fields and before cascading picklists.	<i>Migrating Picklist Values</i>
Cascading Picklists	Must be migrated after picklist values and before page layouts.	<i>Migrating Cascading Picklists</i>
Picklist Value Groups	Must be migrated after fields, picklist values, and cascading picklists.	<i>Migrating Picklist Value Groups</i>
Custom Web Link Fields	Must be migrated before action bar layouts and page layouts.	<i>Migrating Custom Web Link Fields</i>
Concatenated Fields	Must be migrated after fields, picklist values, cascading picklists, and picklist value groups.	<i>Migrating Concatenated Fields</i>

Feature Name	Dependencies	For More Information
Custom Web Applets	Must be migrated before homepage, action bar, and page layouts.	<i>Migrating Custom Web Applets</i>
Sales Assessment Templates	Must be migrated before page layouts.	<i>Migrating Sales Assessment Templates</i>
Homepage Layouts	Must be migrated before page layouts.	<i>Migrating Homepage Layouts</i>
Action Bar Layouts	Must be migrated before page layouts.	<i>Migrating Action Bar Layouts</i>
Related Information Layouts	Must be migrated before page layouts.	<i>Migrating Related Information Layouts</i>
Access Profiles	Must be migrated before roles, and page layouts.	<i>Migrating Access Profiles</i>
Page Layouts	Must be migrated before roles. In addition, page layout field information must be migrated before the following: <ul style="list-style-type: none"> <li>Page layout related information</li> <li>Page layout section information</li> </ul>	<i>Migrating Page Layouts</i>
Dynamic Page Layouts	Must be migrated after page layouts and before roles.	<i>Migrating Dynamic Page Layouts</i>
Search Layouts	Must be migrated after fields and before roles.	<i>Migrating Search Layouts</i>
Roles	Must be migrated after the following: <ul style="list-style-type: none"> <li>Access profiles</li> <li>Page layouts</li> <li>Search layouts</li> </ul> Must be migrated before the following: <ul style="list-style-type: none"> <li>List access and order layouts</li> <li>Role associations for analytics folders</li> </ul>	<i>Migrating Roles</i>
Integration Event Queues	Must be migrated before workflow rule action sets.	<i>Migrating Integration Event Queue Configuration Data</i>
Workflow Rules	Must be migrated after fields and before workflow rule action sets.	<i>Migrating Workflow Rules, Action Sets, and User Sets</i>
Workflow Rule Action Sets	Must be migrated after the following: <ul style="list-style-type: none"> <li>Workflow rules</li> </ul>	<i>Migrating Workflow Rules, Action Sets, and User Sets</i>

Feature Name	Dependencies	For More Information
	<ul style="list-style-type: none"> <li>Integration event queue configuration data</li> </ul>	
Workflow User Sets	Must be migrated after the following: <ul style="list-style-type: none"> <li>Workflow rules</li> </ul>	<i>Migrating Workflow Rules, Action Sets, and User Sets</i>
Assignment Rules	Must be migrated after assignment rule groups.	<i>Migrating Assignment Rule Groups and Assignment Rules</i>
List Access and Order Layouts	Must be migrated after roles.	<i>Migrating List Access and Order Layouts</i>
Role Associations for Analytics Folders	Must be migrated after roles.	<i>Migrating Role Associations for Analytics Folders</i>
Sales Categories	Must be migrated before the following: <ul style="list-style-type: none"> <li>Processes (process administration configuration data)</li> <li>Process administration transition states</li> <li>Sales processes</li> </ul>	<i>Migrating Sales Categories</i>
Process Administration	Must be migrated before process administration transition states, and after the following: <ul style="list-style-type: none"> <li>Customized record types</li> <li>Custom fields</li> <li>Picklist values</li> <li>Sales categories</li> </ul>	<i>Migrating Process Administration Configuration Data</i>
Process Administration Transition States	Must be migrated after the following: <ul style="list-style-type: none"> <li>Customized record types</li> <li>Custom fields</li> <li>Picklist values</li> <li>Processes (process administration configuration data)</li> <li>Sales categories</li> </ul>	<i>Migrating Process Administration Configuration Data</i>
Lead Conversion Mappings	Must be migrated after custom fields.	<i>Migrating Lead Conversion Mapping Data</i>
Sales Processes	Must be migrated after sales categories.	<i>Migrating Sales Processes</i>
Sales Stages	Must be migrated after sales categories and sales processes.	<i>Migrating Sales Stages</i>



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

## Commands for Oracle Migration Tool On Demand

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

```
migrationtool -u UserID -s ServerURL Read AccessProfile "Service Manager"
```

In this example, the following spellings are case sensitive:

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

The following table displays the exact spelling and case of the commands supported by the Oracle Migration Tool On Demand client, and describes the purpose of each command.

Command Name	Description
ReadAll	<p>The <b>ReadAll</b> command exports all configuration data of a specific type from an Oracle CRM On Demand server.</p> <p><b>Note:</b> The <b>ReadAll</b> command does not return preconfigured configuration data. It returns only the customized configuration data. In addition, for features that support translation, a read operation returns the translation values only for the languages for which translation values have been entered.</p>
Read	<p>The <b>Read</b> command exports a single set of configuration data of a specific type from an Oracle CRM On Demand server.</p> <p><b>Note:</b> The <b>Read</b> command does not return preconfigured configuration data. It returns only the customized configuration data. In addition, for features that support translation, a read operation returns the translation values only for the languages for which translation values have been entered.</p>
ReadForValue	<p>This command is used only for custom HTML head tag additions. It exports the custom HTML head tag additions for the Oracle CRM On Demand pages.</p>
Upsert	<p>The <b>Upsert</b> command updates or inserts configuration data of a specific type to an Oracle CRM On Demand server, as required. The configuration data is provided in an input XML file that is specified in the command.</p>
InsertOrUpdate	<p>The <b>InsertOrUpdate</b> command updates workflow configuration data. The command updates a workflow configuration (that is, a workflow rule or a workflow action, or a workflow user set) if</p>

Command Name	Description
	<p>a matching configuration is found. If a matching workflow configuration does not exist, then the command inserts a new workflow configuration. The workflow configuration data is provided in an input XML file that is specified in the command.</p> <p><b>Note:</b> This command is supported only for workflow rules, workflow actions, and workflow user sets.</p>
Delete	<p>The <b>delete</b> command deletes a single set of configuration data from an Oracle CRM On Demand server.</p> <p><b>Note:</b> This command is supported only for custom Web tabs, workflow rules, workflow user sets, and process administration transition states.</p>
Create	<p>The <b>create</b> command creates a new field or set of fields based on the contents of the input XML file that is specified in the command.</p> <p><b>Note:</b> This command is supported only for custom fields (field management).</p>
help	<p>The <b>help</b> command launches the user assistance provided with the Oracle Migration Tool On Demand client.</p>

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

By default, the output XML files that are created by the **Read** and **ReadAll** commands (and in some cases, the **ReadForRuleSet** command) that you run in the command-line interface of the Oracle Migration Tool On Demand client are stored in the repository directory, in a subdirectory that is named for the feature. The path for the directory is as follows:

- If your computer uses a Windows operating system:

*Installation\_Directory\windows\repository\Feature*

- If your computer uses any operating system other than a Windows operating system:

*Installation\_Directory/other/MigrationTool/repository/Feature*

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

In the directory path:

- *Installation\_Directory* is the name of the directory where you unzipped the Oracle Migration Tool On Demand ZIP file.
- *Feature* is a directory name that represents a feature for which the configuration data can be exported by the Oracle Migration Tool On Demand client. The directory for the feature is automatically created by the Oracle Migration Tool On Demand client the first time that you export a configuration for that feature. The directory name is one of the following:
  - AccessProfile
  - ActionBarLayout
  - AssignmentRule
  - AssignmentRuleGroup
  - CascadingPicklist
  - ClientSideExtension

**Note:** The XML files for the client side extensions are placed directly under the ClientSideExtension directory. A subdirectory with the name as the client side extension is also created for each client side extension. The metadata file and the attachment file are placed within the subdirectory.

- ConcatenatedField
- CustomHTMLHeadTag
- CustomRecordType
- Custom Web applets:
  - ActionBarCustomWebApplet
  - DetailPageCustomWebApplet
  - HomePageCustomWebApplet
  - HomeTabCustomWebApplet
- CustomWebLink
- CustomWebTab
- DynamicLayout
- EnableModificationTracking
- FieldAuditSetUp
- FieldManagement

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

- HomepageLayout
- IntegrationEventQueue
- LeadConversionMapping
- ListAccessAndOrder
- PageLayoutField
- PageLayoutRelatedInformation

- o PageLayoutSection
- o Picklist
- o PickValueGroup
- o ProcessAdministration
- o ProcessAdministrationTransitionState
- o RelatedInformationLayout
- o ReportFolder

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

- o Role
- o SalesAssessmentTemplate
- o SalesCategory
- o SalesProcess
- o SalesStage
  - *SalesProcessBaseName*

**Note:** *SalesProcessBaseName* is the language-independent name of the sales process that the sales stage is associated with.

- o SearchLayout
- o WorkflowActionSet
- o WorkflowRuleSet
- o WorkflowUserSet

For example, if you unzip the Oracle Migration Tool On Demand ZIP file in a directory named Oracle Migration Tool On Demand, then when you run the `Read` or `ReadAll` commands to extract access profiles on a computer that uses a Windows operating system, the Oracle Migration Tool On Demand client stores the XML files that it generates in the following directory:

```
Oracle Migration Tool On Demand\windows\repository\AccessProfile
```

**Note:** The output files that are generated by the `ReadAll` commands that are run when you migrate configuration data through the GUI of the Oracle Migration Tool On Demand client are placed in the directory that is selected for the output files when you set up the migration job.

## Specifying Internet Proxy Server Information

If you access the Internet using a proxy server, then you can specify the proxy server information with the Oracle Migration Tool On Demand client. When you use the GUI of the Oracle Migration Tool On Demand client, you specify the proxy server information in the Settings tab of the GUI.

When you use the command-line interface, you specify the proxy server information in parameters, as shown in the following table.

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

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

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

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

Where:

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

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

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

```
MyOnDemandPassword
MyProxyPassword
```

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

```
MyOnDemandPassword MyProxyPassword
```

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

```
MyProxyPassword
MyOnDemandPassword
```

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

# XML Templates and Web Services Description Language

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

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

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

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

The following table describes the values for minOccurs and maxOccurs.

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

## About Web Services APIs

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

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

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

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

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

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

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

```
Oracle Migration Tool On Demand\WSDL
```

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

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

- [Considerations for the Mark for Translation Setting](#)
- [Considerations for Character Encoding in Configuration Data](#)

### Considerations for the Mark for Translation Setting

This topic describes the impact of the Mark for Translation setting (that is set in the Oracle CRM On Demand user interface) on the migration of configuration data using the Oracle Migration Tool On Demand client. In the Oracle Migration Tool On Demand client, the Mark for Translation functionality is supported only for the Sales Categories feature, and it works as follows:

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

Essentially, when the Mark for Translation feature is used, it overwrites all the other languages except for the default language for certain fields with *Name*, where *Name* is the value provided by the user. Any extracts by the Oracle

Migration Tool On Demand client includes only the translation value of the default language and excludes all other languages that have been replaced with *Name*.

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

## Considerations for Character Encoding in Configuration Data

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

The most commonly occurring characters that must be encoded are:

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

To preserve the integrity of the XML content:

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

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

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

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

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

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



# 3 Migrating Configuration Data Using the Graphical User Interface

## Migrating Configuration Data Using the Graphical User Interface

This chapter describes how to migrate configuration data directly from one environment to another environment using the graphical user interface (GUI) of the Oracle Migration Tool On Demand client. It contains the following topics:

- *About the Graphical User Interface*
- *Migrating the Configuration Data*
- *Monitoring the Progress of the Migration Job*
- *Canceling a Migration Job*

## About the Graphical User Interface

You can use the GUI of the Oracle Migration Tool On Demand client to migrate configuration data directly from one environment (the source environment) to another environment (the target environment) without the need to construct and run commands. You can use the GUI to migrate all of the customized configuration data for all of the features that are supported by the Oracle Migration Tool On Demand client, or to migrate the configuration data for certain features only. You cannot use the GUI to migrate a subset of the configuration data for a feature. If a feature that you select for migration has a dependency on configuration data for one or more features that are not selected for the migration, then you are prompted to select those features also for migration. If you choose not to migrate the configuration data for a feature on which a selected feature is dependent, then the selected feature might not be migrated correctly.

If you want to migrate the configuration data for all of the supported features, or all of the configuration data for one or more features, and you do not want to make any changes to the configuration data, then it is recommended that you use the GUI of the Oracle Migration Tool On Demand client. However, you must use the command-line interface if you want to perform any of the following tasks:

- Download your configuration data and make changes to it before you upload it to another environment.
- Download and upload a subset of the configuration data for a feature, for example, if you want to migrate a single access profile or the search layouts for a single record type.

In the GUI of the Oracle Migration Tool On Demand client, the services for migrating the configuration data for the features are grouped into four categories, as follows:

- **Company Administration.** This category includes the services for migrating the configuration data for the following features:
  - Assessment Scripts (that is, sales assessment templates)
  - Report Folders (that is, role association for Analytics folders)
  - Sales Category

- Sales Process
- Sales Stage
- User Management and Access Controls. This category includes the services for migrating the configuration data for access profiles and roles.
- Application Customization. This category includes the services for migrating the configuration data for the application customization features that are supported by the Oracle Migration Tool On Demand client, for example, page layouts, customized record types, custom Web applets and tabs, client side extensions, and so on.
- Business Process Management. This category includes the services for migrating the configuration data for the assignment manager, modification tracking, integration event queue, lead conversion mappings, process administration and process administration transition states, and workflow features.

For each service that you select, the Oracle Migration Tool On Demand client does the following:

- Runs a `ReadAll` command and downloads the output XML files to the appropriate directory on your computer.
- Runs an `Upsert` command for each of the XML files that were downloaded by the `ReadAll` command.

The order in which the services are run is determined by the dependencies between the features. After the `ReadAll` command for a feature completes successfully, the `Upsert` command is run as many times as necessary to process the XML files that were generated by the `ReadAll` command. If you select the Use more resources check box when you set up the migration job, then multiple services will be processed concurrently, and the job will run more quickly.

The Oracle Migration Tool On Demand client places the output from the `ReadAll` commands in the directory that is selected for the output files when the migration job is set up.

## Migrating the Configuration Data

This topic describes how to migrate customized configuration data using the GUI of the Oracle Migration Tool On Demand client.

Before you start to migrate the configuration data for some or all features, note the following considerations:

- To migrate the configuration data for a feature, your user role must have the necessary privileges. For more information about the privileges required, see *Privileges for Administrators*.
- Some features are dependent on other features and cannot be migrated correctly unless the features on which they are dependent are also migrated. For more information about the dependencies, see *Migration Dependencies*.
- The length of time that a migration job takes depends on the amount and complexity of the configuration data that you are migrating. A typical migration job in which all of the supported features are migrated takes around one hour, but your migration job might take more, or less time.
- The Oracle Migration Tool On Demand client places the output from the `ReadAll` commands in the directory that you select for the output files when you set up the migration job. The naming conventions for the subdirectories and files are the same as the naming conventions that are used for the output files that are generated when the `Read` and `ReadAll` commands are run in the command-line interface. For more information, see *Location of Output XML Files for Read and ReadAll Commands*.
- If a pre-existing file in an output directory has the same name as a file that is generated when you migrate the data, then the pre-existing file is overwritten.

- If your target environment already contains configuration data, then it is recommended that you back up that data before you run the migration job. You must use the command-line interface to back up the data, as described in the following procedure.

**CAUTION:** Most components of Oracle CRM On Demand cannot revert to their original states by using the backup copies of the configuration data. For example, after a new access profile is inserted into the target environment, it cannot be removed by using the backup copy (that is, access profiles in Oracle CRM On Demand cannot be deleted). A backup copy of the configuration data provides a reference of the target environment before applying new configuration data.

The following procedure describes how to back up the configuration data from the target environment.

## To back up the configuration data from the target environment

1. Start the command-line interface of the Oracle Migration Tool On Demand client, as described in *Starting the Oracle Migration Tool On Demand Client Command-Line Interface*.
2. Back up the existing configuration data in the target environment by running the appropriate commands for the configuration data that you want to migrate, as follows:

```
migrationtool -u UserID -s TargetServer ReadAll AccessProfile
migrationtool -u UserID -s TargetServer ReadAll ActionBarCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll ActionBarLayout
migrationtool -u UserID -s TargetServer ReadAll AssignmentRule
migrationtool -u UserID -s TargetServer ReadAll AssignmentRuleGroup
migrationtool -u UserID -s TargetServer ReadAll CascadingPicklist
migrationtool -u UserID -s TargetServer ReadAll ClientSideExtension
migrationtool -u UserID -s TargetServer ReadAll ConcatenatedField
migrationtool -u UserID -s TargetServer ReadForValue CustomHTMLHeadTag
migrationtool -u UserID -s TargetServer ReadAll CustomRecordType
migrationtool -u UserID -s TargetServer ReadAll CustomWebLink
migrationtool -u UserID -s TargetServer ReadAll CustomWebTab
migrationtool -u UserID -s TargetServer ReadAll DetailPageCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll DynamicLayout
migrationtool -u UserID -s TargetServer ReadAll EnableModificationTracking
migrationtool -u UserID -s TargetServer ReadAll FieldAuditSetUp
migrationtool -u UserID -s TargetServer ReadAll FieldManagement
migrationtool -u UserID -s TargetServer ReadAll HomePageCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll HomepageLayout
migrationtool -u UserID -s TargetServer ReadAll HomeTabCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll IntegrationEventQueue
migrationtool -u UserID -s TargetServer ReadAll LeadConversionMapping
migrationtool -u UserID -s TargetServer ReadAll ListAccessAndOrder
migrationtool -u UserID -s TargetServer ReadAll PageLayoutField
migrationtool -u UserID -s TargetServer ReadAll PageLayoutRelatedInformation
migrationtool -u UserID -s TargetServer ReadAll PageLayoutSection
migrationtool -u UserID -s TargetServer ReadAll Picklist
migrationtool -u UserID -s TargetServer ReadAll PicklistValueGroup
migrationtool -u UserID -s TargetServer ReadAll ProcessAdministration
migrationtool -u UserID -s TargetServer ReadAll ProcessAdministrationTransitionState
migrationtool -u UserID -s TargetServer ReadAll RelatedInformationLayout
migrationtool -u UserID -s TargetServer ReadAll ReportFolder
migrationtool -u UserID -s TargetServer ReadAll Role
migrationtool -u UserID -s TargetServer ReadAll SalesAssessmentTemplate
migrationtool -u UserID -s TargetServer ReadAll SalesCategory
migrationtool -u UserID -s TargetServer ReadAll SalesProcess
migrationtool -u UserID -s TargetServer ReadAll SalesStage
migrationtool -u UserID -s TargetServer ReadAll SearchLayout
migrationtool -u UserID -s TargetServer ReadAll WorkflowRuleSet
```

where:

- *UserID* is your user sign-in ID for the Oracle CRM On Demand target environment where the extraction occurs.
- *TargetServer* is the URL for the Oracle CRM On Demand server for the target environment.

In addition:

- If you want to back up the workflow action sets for each of the record types and trigger events that exist on the target environment, then run the following command:

```
migrationtool -u UserID -s TargetServer ReadForRuleSet WorkflowActionSet RecordType  
TriggerEvent [ParentRecordType]
```

For more details on extracting workflow action sets, see [Extracting a Workflow Action or a Workflow Action Set](#).

- If you want to back up all workflow user sets that exist on the target environment, then run the following command:

```
migrationtool -u UserID -s TargetServer ReadForRuleSet WorkflowUserSet Analytics ScheduledEvent
```

For more details on extracting workflow user sets, see [Extracting Workflow User Sets](#).

For information about where the XML files that are created by the commands are stored, see [Location of Output XML Files for Read and ReadAll Commands](#).

The following procedure describes how to migrate the customized configuration data from a source environment to a target environment using the GUI of the Oracle Migration Tool On Demand client.

## To migrate the configuration data

1. Start the GUI of the Oracle Migration Tool On Demand client, as described in [Starting the Oracle Migration Tool On Demand Client Graphical User Interface](#).
2. In the Login tab of the GUI, in the Source Environment Details section, enter the URL for the server from which you want to download the configuration data, that is, the server for the source environment.
3. Enter your user name and password for the source environment.
4. In the Target Environment Details section, enter the URL for the server to which you want to upload the configuration data, that is, the server for the target environment.
5. If your user name and password are the same for both the source environment and the target environment, then select the Copy login details to Target check box. Otherwise, enter your user name and password for the target environment.
6. Click Next.
7. In the Services tab, deselect the check box for the service for any feature that you do not want to migrate. By default, all services in all categories are selected, and the customized configuration data for all of the supported features will be migrated unless you deselect one or more services. You can deselect individual services, or an entire category of services, as follows:
  - To deselect all of the services in a category, deselect the check box at the category level.
  - To deselect a specific service, expand the relevant category and deselect the check box for the service. For example, to deselect the services for migrating access profiles and roles, deselect the check box for the User Management and Access Controls category.
8. In the Settings tab, do the following:

- o If you access the Internet using a proxy server, then in the Proxy Settings section, enter the URL, user ID and password, and (optionally) a port number for the Internet proxy server.

**Note:** If you do not specify a port number, then port 80 is used by default.

- o (Optional) If you want the output XML files or the log files to be placed in a directory other than the default directory, then in the Directory Settings section, specify the directory path or browse to a directory and then select it.

The path to the default directory for the output XML files is:

- On a computer using a Windows operating system:

```
Installation_directory\windows\Oracle_Migration_Tool_On_Demand\app\repository
```

- On a computer using any operating system other than a Windows operating system:

```
Installation_directory/other/UMigrationTool/repository
```

The path to the default directory for the log files is:

- On a computer using a Windows operating system:

```
Installation_directory\windows\Oracle_Migration_Tool_On_Demand\app\log
```

- On a computer using any operating system other than a Windows operating system:

```
Installation_directory/other/UMigrationTool/log
```

In the directory path, *Installation\_Directory* is the name of the directory where the Oracle Migration Tool On Demand client is installed.

**Note:** If you choose a directory other than the default directory for the XML output files, then make sure that you do not overwrite the output XML files that were created when you backed up the configuration data from the target environment.

- o (Optional) If you want to allocate additional CPU resources on your computer to the migration job, then in the Advanced Settings section, select the Use more resources check box.

If you select the Use more resources check box, then the Oracle Migration Tool On Demand client uses more of the CPU resources on your computer to process multiple services concurrently, and the migration job will run more quickly.

9. When you finish setting up the migration job and are ready to run the job, click Finish in any one of the Login, Services, or Settings tabs.

If a feature that is selected for migration has a dependency on one or more features that are not selected for migration, then you are prompted to choose whether you want to migrate the configuration data for those features also. Otherwise, the migration tool starts to run the services to migrate the selected features.

10. If you are prompted to choose whether you also want to migrate the configuration data for the features on which one or more of the selected features depend, then do one of the following:

- If you want to migrate the configuration data for the features on which one or more of the selected features depend, then click Yes.
- If you do not want to migrate the configuration data for the features on which one or more of the selected features depend, then click No.

**Note:** If you choose not to migrate a feature on which a selected feature is dependent, then the selected feature might not be migrated correctly.

The migration tool starts to run the services to migrate the configuration data.

You can monitor the progress of the migration job in the Progress tab of the GUI, see *Monitoring the Progress of the Migration Job*.

**CAUTION:** If you close the GUI while a migration job is running, the job is canceled. When a job is canceled, the Oracle Migration Tool On Demand client does not roll back any of the services that have already been run, and any configuration data that has already been uploaded to the target environment is not removed or rolled back. As a result, the configuration data in the target environment might be incomplete, or inconsistent, or both.

## Monitoring the Progress of the Migration Job

After you click Finish in the Oracle CRM On Demand Migration Tool GUI, you can monitor the progress of the migration job in the Progress tab of the GUI.

In the Progress tab, a status bar shows the percentage complete while the job is running. The status of the service for each feature is shown while the service is running and continues to be shown after the service completes. The order in which the services are run is determined by the dependencies between the features. After the `ReadAll` command for a given feature completes successfully, the `Upsert` command is run as many times as necessary to process the XML files that were generated by the `ReadAll` command. If the `ReadAll` command for a feature fails, then the `Upsert` command is skipped (that is, the command is not run) for that feature.

When all of the services have completed, a check mark is shown and the overall status for the job changes to Done. If any errors occurred, review the log file for the job to help you to determine what caused the error.

## Canceling a Migration Job

You can cancel a migration job that is running in the GUI of the Oracle Migration Tool On Demand client.

**CAUTION:** When you cancel a migration job, the Oracle Migration Tool On Demand client does not roll back any of the services that have already been run, and any configuration data that has already been uploaded to the target environment is not removed or rolled back. As a result, the configuration data in the target environment might be incomplete, or inconsistent, or both.

## To cancel a migration job

- In any tab of the GUI, click Cancel.





# 4 Migrating Customized Record Types

## Migrating Customized Record Types

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

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

## Customized Record Types

You can customize record types by changing the display name and associated icons. These changes are reflected in most areas of the user interface. In the case of record types that support teams, you can also customize the record type to specify whether the previous owner of a record is retained in the team for the record after a new owner is assigned to the record.

The following table describes the Oracle Migration Tool On Demand client commands used with customized record types. For more information about running these commands, see [Migrating Customized Record Types](#).

Command	Description
<code>Read CustomRecordType SystemNameOfObject</code>	This command exports the configuration information for a customized record type (object).  <i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">System Names for Record Types</a> .
<code>ReadAll CustomRecordType</code>	This command exports the configuration information for all customized record types.
<code>Upsert CustomRecordType CustomizedRecordTypeXML</code>	This command updates or inserts configuration information for a specified record type.

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

# Privileges Required for Migrating Customized Record Types

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

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

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

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

The following table describes the elements and sections in the XML output file for customized record types.

Description	Element or Section
<IncludeAll> specifies whether the preconfigured configuration information is returned in addition to the customized configuration information (true), or if only the customized configuration information is returned. The default setting is false.	<data:IncludeAll></data:IncludeAll>
<Name> contains the system name of the record type (object), which never changes.	<data:Name>Account</data:Name>
<SupportDisplayImage> corresponds to the Display Image check box in the UI, and is applicable for the Account, Contact, and Product record types only. It specifies whether an image can be displayed on the detail page for the record type (true) or an image cannot be displayed on the detail page for the record type.	<data:SupportDisplayImage></data:SupportDisplayImage>
<IconName> contains the file name of the classic theme icon used for the record type. For the list of available classic theme icon file names, see <i>Classic Theme Icons</i> .	<data:IconName>1801.gif</data:IconName>
<ModernIconName> contains the file name of the modern theme icon used for	<data:ModernIconName>mod_servicehistory_25.png

Description	Element or Section
<p>the record type. For the list of available modern theme icon file names, see <a href="#">Modern Theme Icons</a>.</p>	<pre>&lt;/data:ModernIconName&gt;</pre>
<p>&lt;AccessObjName&gt; contains the access object name of the record type that is being referenced, for example, Account.</p> <p><b>Note:</b> This element is read-only.</p>	<pre>&lt;data:AccessObjName&gt;Account&lt;/data:AccessObjName&gt;</pre>
<p>&lt;CustomizePreviousOwnerChannel&gt; specifies the circumstances in which the previous owner of a record is retained in the team on the record after a new owner is assigned to the record. The possible values include:</p> <ul style="list-style-type: none"> <li>• <b>Never Retain Owner.</b> The default value. The previous owner of the record will not be retained in the team.</li> <li>• <b>Always Retain Owner.</b> The previous owner of the record will be retained in the team, except when the owner is changed using the assignment manager.</li> <li>• <b>All Interactive Operations.</b> The previous owner of the record will be retained in the team, except when the owner is changed using the Import Assistant, the assignment manager, the mass update feature, or Web services.</li> </ul>	<pre>&lt;data:CustomizePreviousOwnerChannel&gt; All Interactive Operations &lt;/data:CustomizePreviousOwnerChannel&gt;</pre>
<p>&lt;CustomizePreviousOwnerAccessProfileId&gt; contains the ID of the access profile that is given to the previous owner for the record, if the previous owner is retained in the team after a new owner is assigned to the record.</p>	<pre>&lt;data:CustomizePreviousOwnerAccessProfileId&gt; 1QA2-HRM9N &lt;/data:CustomizePreviousOwnerAccessProfileId&gt;</pre>
<p>&lt;CustomizePreviousOwnerAccessProfile&gt; contains the name of the access profile that is given to the previous owner for the record, if the previous owner is retained in the team after a new owner is assigned to the record.</p>	<pre>&lt;data:CustomizePreviousOwnerAccessProfile&gt;Full &lt;/data:CustomizePreviousOwnerAccessProfile&gt;</pre>
<p>The &lt;ListOfCustomRecordTypeTranslations&gt; section contains the translation values for the record type.</p>	<pre>&lt;data:ListOfCustomRecordTypeTranslations&gt; . . . &lt;/data:ListOfCustomRecordTypeTranslations&gt;</pre>

Description	Element or Section
<p>The &lt;CustomRecordTypeTranslation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter code for the language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>• &lt;SingularName&gt; contains the singular name for the record type in the language identified by the language code.</li> <li>• &lt;PluralName&gt; contains the plural name for the record type in the language identified by the language code.</li> <li>• &lt;ShortName&gt; contains the short name for the record type in the language identified by the language code.</li> </ul> <p>In this example, for English-American (ENU), the singular name is <i>Account</i>, the plural name is <i>Accounts</i>, and the short name is <i>Acct</i>.</p> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> <li>1. The translation definition, if it is defined.</li> <li>2. The corresponding name element (&lt;SingularName&gt;, &lt;PluralName&gt;, &lt;ShortName&gt;) for the record type, if it is defined and if the translation definition is not defined.</li> <li>3. The system name, if the translation definition and the corresponding name element for the record type are not defined.</li> </ol>	<pre>&lt;data:ListOfCustomRecordTypeTranslations&gt; &lt;data:CustomRecordTypeTranslation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:SingularName&gt;Account&lt;/data:SingularName&gt; &lt;data:PluralName&gt;Accounts&lt;/data:PluralName&gt; &lt;data:ShortName&gt;Acct&lt;/data:ShortName&gt; &lt;/data:CustomRecordTypeTranslation&gt; . . . &lt;/data:ListOfCustomRecordTypeTranslations&gt;</pre>

## Migrating Customized Record Types

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

- [Extracting a Single Customized Record Type](#)
- [Extracting All Customized Record Types](#)
- [Updating or Inserting a Customized Record Type \(Upsert\)](#)

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

## Extracting a Single Customized Record Type

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

### Syntax

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

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

where:

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

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

### Example of Extracting a Single Customized Record Type

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

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

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

## Extracting All Customized Record Types

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

### Syntax

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

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

where:

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

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

## Example of Extracting All Customized Record Types

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

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

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

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

### Syntax

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

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

where:

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

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

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

## Example of Updating or Inserting a Customized Record Type

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

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

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





# 5 Migrating Custom Web Tabs

## Migrating Custom Web Tabs

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

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

## Custom Web Tabs

A *custom Web tab* allows you to display Web content, a report, or a dashboard in a tab in Oracle CRM On Demand.

The following table describes the Oracle Migration Tool On Demand client commands used with custom Web tabs. For more information about running these commands, see [Migrating Custom Web Tabs](#).

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

## Privileges Required for Migrating Custom Web Tabs

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

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

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

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

The following table describes the elements and sections in the custom Web tabs XML output file.

Description	Element or Section
<DisplayName> contains the name of the Web tab. This name is used in the user interface if no translated display names are provided.	<data:DisplayName>test</data:DisplayName>
<Description> contains the description for the custom Web tab.	<data:Description></data:Description>
<Type> defines the type of the custom Web tab, which is one of the following: <ul style="list-style-type: none"> <li>• Dashboard</li> <li>• HTML</li> <li>• Report</li> <li>• URL</li> </ul>	<data:Type></data:Type>
<HTMLHeadAdditions> specifies the HTML code that is included in the source of a rendered Oracle CRM On Demand Web page in the <head> tags at the top of the page (for custom Web tabs of the HTML type only).	<data:HTMLHeadAdditions></data:HTMLHeadAdditions>
<WebTabHTML> specifies the HTML code that is rendered in a custom Web tab (for custom Web tabs of the HTML type only).	<data:WebTabHTML></data:WebTabHTML>

Description	Element or Section
<p>&lt;URL&gt; contains the URL information for the custom Web tab (for custom Web tabs of the URL type only).</p> <p><b>Note:</b> Although it is possible to update or insert a custom Web tab of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.</p>	<pre>&lt;data:Url&gt;&lt;/data:Url&gt;</pre>
<p>&lt;FrameHeight&gt; specifies the frame height of the custom Web tab.</p>	<pre>&lt;data:FrameHeight&gt;&lt;/data:FrameHeight&gt;</pre>
<p>&lt;FrameWidth&gt; specifies the frame width of the custom Web tab.</p>	<pre>&lt;data:FrameWidth&gt;&lt;/data:FrameWidth&gt;</pre>
<p>&lt;IconName&gt; contains the file name of the icon used for this custom Web tab. In this example, icon_custtab.gif is the graphic file that is used. For the list of available icon file names, see <i>Classic and Modern Theme Icons</i>.</p>	<pre>&lt;data:IconName&gt;icon_custtab.gif&lt;/data:IconName&gt;</pre>
<p>For custom Web tabs of the Dashboard type only, the &lt;DashboardType&gt; section contains the following elements:</p> <ul style="list-style-type: none"> <li>&lt;DashboardPath&gt; contains the path to the dashboard. The dashboard must be located directly in the Dashboards folder under Shared Folders and not at a deeper level.</li> <li>&lt;DashboardParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web tab of the Dashboard type. For information about specifying parameters for embedded dashboards, see <i>Oracle CRM On Demand Online Help</i>.</li> </ul>	<pre>&lt;data:DashboardType&gt;   &lt;data:DashboardPath&gt; Company Wide Shared Folder : Dashboards : Accounts Dashboard   &lt;/data:DashboardPath&gt;   &lt;data:DashboardParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%Row_Id%   &lt;/data:DashboardParameters&gt; &lt;/data:DashboardType&gt;</pre>
<p>For custom Web tabs of the Report type only, the &lt;ReportType&gt; section contains the following elements:</p> <ul style="list-style-type: none"> <li>&lt;ReportPath&gt; contains the path to the analysis. The analysis must be located under Shared Folders.</li> <li>&lt;ReportParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters</li> </ul>	<pre>&lt;data:ReportType&gt;   &lt;data:ReportPath&gt; Company Wide Shared Folder : My Company Account Custom Analyses : Account Custom Analysis   &lt;/data:ReportPath&gt;   &lt;data:ReportParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%Row_Id%   &lt;/data:ReportParameters&gt;   &lt;data:ReportPrompts&gt;&gt;false&lt;/data:ReportPrompts&gt;   &lt;data:RefreshLink&gt;&gt;true&lt;/data:RefreshLink&gt;   &lt;data:PrintLink&gt;&gt;true&lt;/data:PrintLink&gt;</pre>

Description	Element or Section
<p>are present, then the syntax of those parameters is validated when you insert or update a custom Web tab of the Report type. For information about specifying parameters for embedded analyses, see <i>Oracle CRM On Demand Online Help</i> .</p> <p><b>Note:</b> If the &lt;ReportPrompts&gt; element is set to true, then any filters that are specified in the &lt;ReportParameters&gt; element are ignored at runtime, even if no prompts are defined for the analysis.</p> <ul style="list-style-type: none"> <li>• &lt;ReportPrompts&gt; corresponds to the Display Report Prompts check box in the UI. It determines whether any prompts that are defined for the analysis are displayed at runtime (true) or are not displayed (false).</li> <li>• &lt;RefreshLink&gt; determines whether the Refresh link that allows users to refresh the data in the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;PrintLink&gt; determines whether the Print link that allows users to print the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;ExportLink&gt; determines whether the Export link that allows users to download the analysis is displayed at runtime (true) or is not displayed (false).</li> </ul>	<pre>&lt;data:ExportLink&gt;true&lt;/data:ExportLink&gt; &lt;/data:ReportType&gt;</pre>
<p>The &lt;ListOfCustomWebTabTranslations&gt; section contains the translation values for the custom Web tab.</p>	<pre>&lt;data:ListOfCustomWebTabTranslations&gt; . . . &lt;/data:ListOfCustomWebTabTranslations&gt;</pre>
<p>The &lt;CustomWebTabTranslation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter code for the language. For the list of language codes, see <i>Language Codes and Their Corresponding Language and Country</i>.</li> <li>• &lt;DisplayName&gt; contains the display name for the Web tab in the language identified by the language code.</li> </ul> <p>In this example, for English-American (ENU), the display name is <i>My Custom Web Tab</i>.</p> <p>The precedence for determining the display name is as follows:</p>	<pre>&lt;data:ListOfCustomWebTabTranslations&gt; &lt;data:CustomWebTabTranslation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:DisplayName&gt;My Custom Web Tab &lt;/data:DisplayName&gt; &lt;/data:CustomWebTabTranslation&gt; . . . &lt;/data:ListOfCustomWebTabTranslations&gt;</pre>

Description	Element or Section
<ol style="list-style-type: none"><li>1. The translation definition, if it is defined.</li><li>2. The information contained in the &lt;DisplayName&gt; element, if it is defined and if the translation definition is not defined.</li><li>3. The system name, if the translation definition and the &lt;DisplayName&gt; element are not defined.</li></ol>	

## Migrating Custom Web Tabs

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

- [Extracting a Single Custom Web Tab](#)
- [Extracting All Custom Web Tabs](#)
- [Updating or Inserting a Custom Web Tab \(Upsert\)](#)

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

### Extracting a Single Custom Web Tab

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

#### Syntax

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

```
migrationtool -u UserID -s ServerURL Read CustomWebTab SystemNameOfCustomWebTab
```

where:

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

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

## Example of Extracting a Single Custom Web Tab

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

```
migrationtool -u UserID -s ServerURL Read CustomWebTab "My Custom Web Tab"
```

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

## Extracting All Custom Web Tabs

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

### Syntax

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

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

where:

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

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

## Example of Extracting All Custom Web Tabs

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

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

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

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

### Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert CustomWebTab CustomWebTabXML
```

where:

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

## Example of Updating or Inserting a Custom Web Tab

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

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

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

## Deleting a Single Custom Web Tab

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

### Syntax

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

```
migrationtool -u UserID -s ServerURL Delete CustomWebTab SystemNameOfCustomWebTab
```

where:

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

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

## Example of Deleting a Single Custom Web Tab

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

```
migrationtool -u UserID -s ServerURL Delete CustomWebTab "My Custom Web Tab"
```

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





# 6 Migrating Custom Fields

## Migrating Custom Fields

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

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

## Custom Fields

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

The following table describes the Oracle Migration Tool On Demand client commands used with fields. For more information about running these commands, see [Migrating Custom Fields](#).

Command	Description
<pre>[-sortspec "fieldname[ sortorder] [,fieldname[ sortorder]] [,fieldname[ sortorder]]"] Read FieldManagement SystemNameOfObject</pre>	<p>This command exports all customized and custom fields for a specific record type.</p> <p><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">System Names for Record Types</a>.</p> <p>The optional <code>sortspec</code> parameter allows you to sort the output by one or more specified fields, and to specify the sort order (ascending or descending) for each sort field. You can specify up to three sort fields, in any order. The supported fields are:</p> <ul style="list-style-type: none"> <li>• CreatedDate</li> <li>• ModifiedDate</li> <li>• Name</li> </ul> <p>The supported values for the sort order are:</p> <ul style="list-style-type: none"> <li>• <b>Asc</b> or <b>Ascending</b> for sorting in ascending order.</li> <li>• <b>Desc</b> or <b>Descending</b> for sorting in descending order.</li> </ul> <p><b>Note:</b> The sort order values are not case-sensitive.</p> <p>If you do not specify a sort field, then the output is sorted by created date, in ascending order. If you specify a sort field but do not specify a sort order for the field, then the default sort order is ascending.</p>
<pre>[-sortspec "fieldname[ sortorder] [,fieldname[</pre>	<p>This command exports all customized and custom fields for all objects.</p>

Command	Description
<code>sortorder]] [, fieldname[sortorder]]"] ReadAll FieldManagement</code>	For information about the optional <code>sortspec</code> parameter, see the description of the <code>Read</code> command.
<code>Upsert FieldManagement FieldManagementXML</code>	This command updates or inserts a set of fields in a particular object, as required.
<code>Create FieldManagement FieldManagementXML</code>	This command creates a new set of fields on a particular object from the contents of an XML file you create manually that contains the new field definitions, rather than extracting the definition from a company.

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

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

The system names for the record types are listed in *System Names for Record Types*. You might not have certain objects available depending on how your company is set up, so some of the system names that are listed might not exist for your company.

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

## Privileges Required for Migrating Custom Fields

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

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

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

# Elements and Sections in the Field Management XML Output File

The following table describes the elements and sections in the field management XML output file.

Description	Element or Section
<p>&lt;IncludeAll&gt; specifies whether the preconfigured configuration information is returned in addition to the customized configuration information (true), or if only the customized configuration information is returned. The default setting is false.</p>	<pre>&lt;data:IncludeAll&gt;true&lt;/data:IncludeAll&gt;</pre>
<p>When the &lt;IncludeAll&gt; element is set to true, the service fetches all controls for the object, including child controls. If the child control fetched is an address field and the address field is part of the default address template, then the &lt;DefaultAddressField&gt; element is set to true, otherwise it is set to false. This element can then be used as a marker to identify the best address field of the set.</p>	<pre>&lt;data:DefaultAddressField&gt;true&lt;/data:DefaultAddressField&gt;</pre>
<p>&lt;ObjectName&gt; contains the system name of the record type (object), which never changes.</p>	<pre>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</pre>
<p>The &lt;ListOfFields&gt; section contains all of the customized field definitions for the record type.</p>	<pre>&lt;data:ListOfFields&gt; . . . &lt;/data:ListOfFields&gt;</pre>
<p>The &lt;Field&gt; section contains all of the elements for a single field.</p>	<pre>&lt;data:ListOfFields&gt;   &lt;data:Field&gt;   . . .   &lt;/data:Field&gt; . . . &lt;/data:ListOfFields&gt;</pre>
<p>&lt;Name&gt; contains the system name of the field, which never changes.</p>	<pre>&lt;data:Field&gt;   &lt;data:Name&gt;TEXTSM_001&lt;/data:Name&gt;   . . . &lt;/data:Field&gt;</pre>
<p>&lt;DisplayName&gt; contains the name that is used in the user interface, if no translated display names are provided.</p>	<pre>&lt;data:Field&gt; . . .   &lt;data:DisplayName&gt;My Custom Field &lt;/data:DisplayName&gt; . . .</pre>

Description	Element or Section
	<pre>&lt;/data:Field&gt;</pre>
<p>&lt;FieldType&gt; specifies the type of field.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:FieldType&gt;Text (Short) &lt;/data:FieldType&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;IntegrationTag&gt; contains the custom integration tag name of the field. This tag can be modified by Oracle CRM On Demand users.</p> <p>The default integration tag is of the format:</p> <p><i>fieldtypeDisplay_Name</i></p> <p>For example, stMy_Custom_Field is assigned to a custom field of type Text (Short) with the Display Name value of: My Custom Field.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:IntegrationTag&gt;stMy_Custom_Field &lt;/data:IntegrationTag&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;GenericIntegrationTag&gt; contains the default integration tag assigned to the field by Oracle CRM On Demand. This element cannot be modified by Oracle CRM On Demand users.</p> <p><b>Note:</b> For non-custom fields, the &lt;GenericIntegrationTag&gt; and the &lt;IntegrationTag&gt; values are the same.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:GenericIntegrationTag&gt;CustomText32 &lt;/data:GenericIntegrationTag&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;Required&gt; specifies whether the field is a required field (true), or is not a required field (false).</p> <p>If a condition is specified in the &lt;RequiredCondition&gt; element, then the &lt;Required&gt; element must be set to false.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:Required&gt;&gt;false&lt;/data:Required&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;RequiredCondition&gt; can contain an expression that specifies the criteria that make the field required. If an expression is specified, then the field becomes required when the condition specified in the expression is met. In the example shown here, the field becomes required when the Customer value is selected in the Account Type field.</p> <p>If the &lt;Required&gt; element is set to true, then the &lt;RequiredCondition&gt; element must not contain a value.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:RequiredCondition&gt; [ {Type} ]=LookupValue ("ACCOUNT_TYPE", "Customer") &lt;/data:RequiredCondition&gt; . . . &lt;/data:Field&gt;</pre>

Description	Element or Section
<p>&lt;Optimized&gt; specifies whether this is an optimized field (true) or is not an optimized field (false). Optimized fields are supported for certain record types only. For more information about optimized fields, see <i>Oracle CRM On Demand Online Help</i>.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:Optimized&gt;&gt;false&lt;/data:Optimized&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;ReadOnly&gt; determines if the field is a read-only field (true) or is not a read-only field (false).</p>	<pre>&lt;data:Field&gt; . . . &lt;data:ReadOnly&gt;&gt;false&lt;/data:ReadOnly&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;DefaultValue&gt; contains the default value of the field, if one is defined.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:DefaultValue&gt;&lt;/data:DefaultValue&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;FieldValidation&gt; contains the validation rules for the custom field, if any are defined.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:FieldValidation&gt;&lt;/data:FieldValidation&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;PostDefault&gt; specifies whether the field is prepopulated with the default value when a new record is being created. If the &lt;PostDefault&gt; element is set to true, then the field is not prepopulated with the default value when the record is created, but if a value is not provided for the field before the record is saved, then the default value is assigned to the field when the record is saved.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:PostDefault&gt;&gt;false&lt;/data:PostDefault&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;DenormalizedControl&gt; corresponds to the Related Information check box in field management. For certain record types, you can create custom related information fields. For those record types, the following fields are available on the Field Edit page in the UI: Related Information, Related Record Type, and Related Field. These fields are used only for creating custom related information fields. Most of the other fields on the Field Edit page become read-only fields after you select the Related Information check box. For more information about custom related information fields, see <i>Oracle CRM On Demand Online Help</i>.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:DenormalizedControl&gt;&gt;false &lt;/data:DenormalizedControl&gt; . . . &lt;/data:Field&gt;</pre>

Description	Element or Section
<p>&lt;DenormalizedAssociateControlName&gt; corresponds to the Related Record Type picklist in field management.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:DenormalizedAssociateControlName/&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;DenormalizedControlName&gt; corresponds to the Related Field picklist in field management.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:DenormalizedControlName/&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;ValidationErrorMsg&gt; contains the error message that is displayed when a validation rule fails, if a message is defined.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:ValidationErrorMsg&gt;&lt;/data:ValidationErrorMsg&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;ToolTipText&gt; contains the tooltip text that is displayed for the field in the Oracle CRM On Demand UI, if tooltip text is defined.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:ToolTipText&gt;&lt;/data:ToolTipText&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;Description&gt; contains the description of the field.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:Description&gt;&lt;/data:Description&gt; . . . &lt;/data:Field&gt;</pre>
<p>&lt;TooltipFormat&gt; specifies the format of the tooltip text, which can be HTML or Plain Text.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:TooltipFormat&gt;HTML&lt;/data:TooltipFormat&gt; . . . &lt;/data:Field&gt;</pre>
<p>The &lt;ListOfFieldTranslations&gt; section contains the translation values for the field.</p>	<pre>&lt;data:Field&gt; . . . &lt;data:ListOfFieldTranslations&gt; . . . &lt;/data:ListOfFieldTranslations&gt; . . . &lt;/data:Field&gt;</pre>
<p>The &lt;FieldTranslation&gt; section contains the translation values for one language.</p> <ul style="list-style-type: none"> <li>&lt;LanguageCode&gt; contains the three-letter code for a language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>&lt;DisplayName&gt; contains the display name for the field in the language identified by the language code.</li> </ul>	<pre>&lt;data:Field&gt; . . . &lt;data:ListOfFieldTranslations&gt; &lt;data:FieldTranslation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:DisplayName&gt;Roles&lt;/data:DisplayName&gt; &lt;data:ValidationErrorMsg&gt;&lt;/data:ValidationErrorMsg&gt; &lt;data:ToolTipText&gt;&lt;/data:ToolTipText&gt; &lt;data:Description&gt;&lt;/data:Description&gt; &lt;/data:FieldTranslation&gt; . . . &lt;/data:ListOfFieldTranslations&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;ValidationErrorMsg&gt; contains the validation error message for the field in the language identified by the language code.</li> <li>• &lt;ToolTipText&gt; contains the tooltip text for the field in the language identified by the language code.</li> <li>• &lt;Description&gt; contains the description for the field in the language identified by the language code.</li> </ul> <p>The precedence for determining the display name is as follows:</p> <ol style="list-style-type: none"> <li>1. The translation definition, if it is defined.</li> <li>2. The information contained in the &lt;DisplayName&gt; element, if it is defined and if the translation definition is not defined.</li> <li>3. The system name, if the translation definition and the &lt;DisplayName&gt; element are not defined.</li> </ol>	<pre>                 . . .             &lt;/data:Field&gt;             </pre>
<p>&lt;SharedPicklistFlag&gt; corresponds to the Enable Shared Picklist Values check box in field management. On certain record types, you can create a custom picklist field that takes its list of values from another picklist field on the same record type or on a different record type. The field from which the values are taken is referred to as the source field, and the field that shares the values from the source field is referred to as the destination field. For these record types, the following fields are available on the Field Edit page in the UI: Enable Shared Picklist Values, Shared Record Type, and Shared Field. For more information, see <i>Oracle CRM On Demand Online Help</i> .</p>	<pre>                 &lt;data:Field&gt;                 . . .                 &lt;data:SharedPicklistFlag&gt;true&lt;/data:SharedPpicklistFlag&gt;                 . . .             &lt;/data:Field&gt;             </pre>
<p>&lt;SharedPicklistObject&gt; corresponds to the Shared Record Type picklist in field management.</p>	<pre>                 &lt;data:Field&gt;                 . . .                 &lt;data:SharedPicklistObject&gt;Action                 &lt;/data:SharedPicklistObject&gt;                 . . .             &lt;/data:Field&gt;             </pre>
<p>&lt;SharedPicklistControl&gt; corresponds to the Shared Field picklist in field management.</p>	<pre>                 &lt;data:Field&gt;                 . . .                 &lt;data:SharedPicklistControl&gt;Region                 &lt;/data:SharedPicklistControl&gt;             &lt;/data:Field&gt;             </pre>

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

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

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

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

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

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

## Migrating Custom Fields

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

- [Extracting Customized Field Definitions for a Single Object](#)
- [Extracting Customized Field Definitions for All Objects](#)
- [Updating or Inserting a Set of Field Definitions \(Upsert\)](#)
- [Creating a New Field Definition](#)

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

## Extracting Customized Field Definitions for a Single Object

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

### Syntax

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



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

where:

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

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

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

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

```
migrationtool -u UserID -s ServerURL Read FieldManagement "Account Contact"
```

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

The following is an example of extracting the customized field definitions for the Account object, sorted by the Name field, in ascending order:

```
migrationtool -u UserID -s ServerURL -sortspec "Name ASC" Read FieldManagement Account
```

## Extracting Customized Field Definitions for All Objects

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

### Syntax

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

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

where:

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

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

## Example of Extracting Customized Field Definitions for All Objects

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

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

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

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

### Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert FieldManagement FieldManagementXML
```

where:

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

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

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

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

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

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

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

## Creating a New Field Definition

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

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

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

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

## Syntax

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

```
migrationtool -u UserID -s ServerURL Create FieldManagement FieldManagementXML
```

where:

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

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

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

## Example of Creating a New Field Definition

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

```
migrationtool -u UserID -s ServerURL Create FieldManagement "C:\My Files\MyAccountField.xml"
```

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



# 7 Migrating Picklist Values

## Migrating Picklist Values

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

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

## Picklist Values

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

The following table describes the Oracle Migration Tool On Demand client commands used with picklist values. For more information about running these commands, see [Migrating Picklist Values](#).

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

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

## Privileges Required for Migrating Picklist Values

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

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

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

Field management must be supported by the object.

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

## Elements and Sections in the Picklist XML Output File

The following table describes the elements and sections in the picklist XML output file.

Description	Element or Section
<IncludeAll> specifies whether the preconfigured configuration information is returned in addition to the customized configuration information (true), or if only the customized configuration information is returned. The default setting is false.	<code>&lt;data:IncludeAll&gt;&gt;true&lt;/data:IncludeAll&gt;</code>
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account Team&lt;/data:ObjectName&gt;</code>
The <ListOfPicklists> section contains the details of the picklists fields.	<code>&lt;data:ListOfPicklists&gt; . . . &lt;/data:ListOfPicklists&gt;</code>
The <Picklist> section contains all of the elements for one picklist field.	<code>&lt;data:Picklist&gt; . . . &lt;/data:Picklist&gt;</code>
<Name> contains the system name of the picklist field within the record type.	<code>&lt;data:Picklist&gt;   &lt;data:Name&gt;Team Role&lt;/data:Name&gt; . . . &lt;/data:Picklist&gt;</code>
<WebSvcTag> contains the Web Services v2.0 integration tag name for the field. This element is read-only and is ignored in Upsert operations.	<code>&lt;data:Picklist&gt; . . .   &lt;data:WebSvcTag&gt;Team Role&lt;/data:WebSvcTag&gt; . . . &lt;/data:Picklist&gt;</code>
<OrderAllLanguages> specifies whether the values in the picklist field are to be ordered alphabetically for all languages (Y) or ordered according to the values specified in the <Order> element (N).	<code>&lt;data:Picklist&gt; . . .   &lt;data:OrderAllLanguages&gt;N&lt;/data:OrderAllLanguages&gt; . . . &lt;/data:Picklist&gt;</code>

Description	Element or Section
<p>The &lt;ListOfPicklistValues&gt; section contains the details of the picklist field values.</p>	<pre>&lt;data:Picklist&gt; . . . &lt;data:ListOfPicklistValues&gt; . . . &lt;/data:ListOfPicklistValues&gt; . . . &lt;/data:Picklist&gt;</pre>
<p>The &lt;PicklistValue&gt; section contains the details of one picklist value:</p> <ul style="list-style-type: none"> <li>• &lt;ValueId&gt; is the identifier assigned to the specific picklist value. This element maps to the Id field in the Edit Picklist window for the picklist field.</li> <li>• &lt;Disabled&gt; specifies whether the value is disabled (true) or is not disabled (false).</li> </ul>	<pre>&lt;data:Picklist&gt; . . . &lt;data:ListOfPicklistValues&gt; &lt;data:PicklistValue&gt; &lt;data:ValueId&gt;Executive Sponsor &lt;/data:ValueId&gt; &lt;data:Disabled&gt;&gt;false&lt;/data:Disabled&gt; . . . &lt;/data:PicklistValue&gt; . . . &lt;/data:ListOfPicklistValues&gt; . . . &lt;/data:Picklist&gt;</pre>
<p>The &lt;ListOfValueTranslations&gt; section contains the translation values for the picklist value.</p>	<pre>&lt;data:Picklist&gt; . . . &lt;data:ListOfPicklistValues&gt; &lt;data:PicklistValue&gt; . . . &lt;data:ListOfValueTranslations&gt; . . . &lt;/data:ListOfValueTranslations&gt; . . . &lt;/data:PicklistValue&gt; . . . &lt;/data:ListOfPicklistValues&gt; . . . &lt;/data:Picklist&gt;</pre>
<p>The &lt;ValueTranslation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter code for a language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>• &lt;Value&gt; contains the picklist value in the language identified by the language code.</li> <li>• &lt;Order&gt; specifies the order for the picklist value within the set of picklist values in the specified language.</li> </ul>	<pre>&lt;data:Picklist&gt; . . . &lt;data:ListOfPicklistValues&gt; &lt;data:PicklistValue&gt; . . . &lt;data:ListOfValueTranslations&gt; &lt;data:ValueTranslation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:Value&gt;Executive Sponsor &lt;/data:Value&gt; &lt;data:Order&gt;2&lt;/data:Order&gt; &lt;data:Description&gt;CEO of the division&lt;/data:Description&gt; &lt;/data:ValueTranslation&gt; &lt;/data:ListOfValueTranslations&gt; . . . &lt;/data:PicklistValue&gt; . . . &lt;/data:ListOfPicklistValues&gt; . . . &lt;/data:Picklist&gt;</pre>

Description	Element or Section
<p><b>Note:</b> &lt;Order&gt; is a required value. If &lt;OrderAllLanguages&gt; specifies Y (the picklist values are to be ordered alphabetically for all languages), then the value in &lt;Order&gt; is ignored. If &lt;OrderAllLanguages&gt; specifies N or is not specified, then the picklist values are ordered according to the values specified in &lt;Order&gt;.</p> <ul style="list-style-type: none"><li>• &lt;Description&gt; contains a description of the picklist value in the language identified by the language code.</li></ul>	

## Migrating Picklist Values

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

- *Extracting All Picklist Values for a Single Object*
- *Extracting Picklist Values for a Single Picklist Field*
- *Extracting All Picklist Values for All Objects*
- *Updating or Inserting a Set of Picklist Values for a Single Object (Upsert)*

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

## Extracting All Picklist Values for a Single Object

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

### Syntax

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

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

where:

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



- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract the picklists, for example, Account. The system names for the record types are listed in *System Names for Record Types*.

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

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

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

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

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

## Extracting Picklist Values for a Single Picklist Field

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

### To extract the picklist values for a single picklist field

1. Prepare an input XML file as follows:

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

where:

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

**Note:** If you do not know the system name of a customized or custom picklist field, then run the Read FieldManagement command for the record type. In the output file from that command, the <Name> element shows the system name of the field. As an example, PICK\_000 is the system name of the first custom picklist field that is created for the Account record type. For more information about the Read FieldManagement command, see *Custom Fields*.

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

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

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

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

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

## Extracting All Picklist Values for All Objects

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

### Syntax

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

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

where:

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

### Example of Extracting All Picklist Values for All Objects

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

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

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

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

### Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert Picklist PicklistXML
```

where:

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

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

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

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

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

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

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



# 8 Migrating Picklist Value Groups

## Migrating Picklist Value Groups

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

- *Picklist Value Groups*
- *Privileges Required for Migrating Picklist Value Groups*
- *Elements and Sections in the Picklist Value Groups XML Output File*
- *Migrating Picklist Value Groups*

## Picklist Value Groups

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

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

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

The following table describes the Oracle Migration Tool On Demand client commands used with picklist value groups. For more information about running these commands, see *Migrating Picklist Value Groups*.

Command	Description
<code>Read PickValueGroup</code> <code>PickValueGroupName</code>	This command exports the picklist value group details for the specified picklist value group.
<code>ReadAll PickValueGroup</code>	This command exports all picklist value groups in the Oracle CRM On Demand tenant.

Command	Description
<code>Upsert PickValueGroup PickValueGroupXML</code>	This command updates or inserts a picklist value group.

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

## Privileges Required for Migrating Picklist Value Groups

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

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

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

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

The following table describes the elements and sections in the picklist value group XML output file.

Description	Element or Section
<PicklistValueGroupName> contains the case-sensitive system name of the picklist value group.	<code>&lt;data:PicklistValueGroupName&gt;PVG Name&lt;/data:PicklistValueGroupName&gt;</code>
<Description> contains the description for the picklist value group.	<code>&lt;data:Description&gt;PVG description&lt;/data:Description&gt;</code>
<PickValueGroupId> contains the row ID of the picklist value group.	<code>&lt;data:PickValueGroupId&gt;1QA2-NX0XH&lt;/data:PickValueGroupId&gt;</code>
The <ListOfPicklistTypeSet> section contains details of the picklist values that are mapped to the picklist value group.	<code>&lt;data:ListOfPicklistTypeSet&gt; . . . &lt;/data:ListOfPicklistTypeSet&gt;</code>
The <PicklistTypeSet> section contains details of the mapped picklist values from one picklist field, as follows:	<code>&lt;data:ListOfPicklistTypeSet&gt; &lt;data:PicklistTypeSet&gt; &lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt; &lt;data:FieldName&gt;Type&lt;/data:FieldName&gt; &lt;data:ListOfLicNameSet&gt;</code>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;ObjectName&gt; contains the system name of the record type to which the picklist field belongs.</li> <li>• &lt;FieldName&gt; contains the system name of the picklist field.</li> <li>• The &lt;ListOfLicNameSet&gt; section contains the details of the values from this picklist field that are mapped to the picklist value group. Each &lt;LicName&gt; element contains the language-independent name of a single picklist value.</li> </ul>	<pre> &lt;data:LicNameSet&gt; &lt;data:LicName&gt;Customer&lt;/data:LicName&gt; &lt;data:LicNameSet&gt; &lt;data:LicName&gt;Competitor&lt;/data:LicName&gt; . . . &lt;/data:LicNameSet&gt; . . . &lt;/data:ListOfLicNameSet&gt; . . . &lt;/data:PicklistTypeSet&gt; . . . &lt;/data:ListOfPicklistTypeSet&gt;                     </pre>

## Migrating Picklist Value Groups

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

- [Extracting a Single Picklist Value Group](#)
- [Extracting All Picklist Value Groups](#)
- [Updating or Inserting a Picklist Value Group](#)

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

### Extracting a Single Picklist Value Group

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

#### Syntax

```
migrationtool -u UserID -s ServerURL Read PickValueGroup PickValueGroupName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *PickValueGroupName* is the name of the picklist value group that you want to extract.

## Extracting All Picklist Value Groups

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

### Syntax

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

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

where:

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

## Updating or Inserting a Picklist Value Group

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

### Syntax

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

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

where:

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

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



# 9 Migrating Cascading Picklists

## Migrating Cascading Picklists

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

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

## Cascading Picklists

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

The following table describes the Oracle Migration Tool On Demand client commands used with cascading picklists. For more information about running these commands, see [Migrating Cascading Picklists](#).

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

## Privileges Required for Migrating Cascading Picklists

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

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

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

Cascading picklists must be supported by the object.

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

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

The following table describes the elements and sections in the cascading picklist XML output file.

Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
The <ListOfCascadingPicklist> contains all of the cascading picklist definitions for the record type.	<code>&lt;data:ListOfCascadingPicklist&gt; . . . &lt;/data:ListOfCascadingPicklist&gt;</code>
The <CascadingPicklist> section contains all of the details for a cascading picklist.	<code>&lt;data:CascadingPicklist&gt; . . . &lt;/data:CascadingPicklist&gt;</code>
<ParentPicklist> contains the parent picklist.	<code>&lt;data:CascadingPicklist&gt;   &lt;data:ParentPicklist&gt;Organization Relationship   &lt;/data:ParentPicklist&gt; . . . &lt;/data:CascadingPicklist&gt;</code>
<RelatedPicklist> contains the related picklist.	<code>&lt;data:CascadingPicklist&gt; . . .   &lt;data:RelatedPicklist&gt;Region&lt;/data:RelatedPicklist&gt; . . . &lt;/data:CascadingPicklist&gt;</code>
<Description> contains the description of the cascading picklist.	<code>&lt;data:CascadingPicklist&gt; . . .   &lt;data:Description&gt;&lt;/data:Description&gt; . . . &lt;/data:CascadingPicklist&gt;</code>
<SharedPicklistFlg> corresponds to the Enable Shared Cascading Picklist check box in the Cascading Picklist Setup page, and is applicable only for record types that support sharing picklist values. If this element is set to true, then the cascading	<code>&lt;data:CascadingPicklist&gt; . . .   &lt;data:SharedPicklistFlg&gt;&gt;false&lt;/data:SharedPicklistFlg&gt; . . . &lt;/data:CascadingPicklist&gt;</code>

Description	Element or Section
<p>picklist shares the configuration of another cascading picklist on a different record type, and the associations between the parent picklist values and the related picklist values are read-only.</p> <p>The &lt;SharedPicklistFlg&gt; element can be set to true only if both the parent picklist and the related picklist on the current record type are custom picklist fields that take their values from the picklist fields that are used in a cascading picklist definition on another record type. For more information, see <i>Oracle CRM On Demand Online Help</i>.</p>	
<p>The &lt;ListOfPicklistValueAssociations&gt; section contains all of the associations for the cascading picklist.</p>	<pre>&lt;data:CascadingPicklist&gt; . . . &lt;data:ListOfPicklistValueAssociations&gt; . . . &lt;/data:ListOfPicklistValueAssociations&gt; &lt;/data:CascadingPicklist&gt;</pre>
<p>The &lt;PicklistValueAssociations&gt; section contains the details of the associations for a single value from the parent picklist:</p> <ul style="list-style-type: none"> <li>• &lt;ParentPicklistValue&gt; contains the parent picklist value.</li> <li>• &lt;RelatedPicklistValue&gt; contains a related picklist value. There is one &lt;RelatedPicklistValue&gt; element for each value in the related picklist that is associated with the &lt;ParentPicklistValue&gt;.</li> </ul>	<pre>&lt;data:CascadingPicklist&gt; . . . &lt;data:ListOfPicklistValueAssociations&gt; &lt;data:PicklistValueAssociations&gt; &lt;data:ParentPicklistValue&gt;IHN &lt;/data:ParentPicklistValue&gt; &lt;data:RelatedPicklistValue&gt;East &lt;/data:RelatedPicklistValue&gt; &lt;data:RelatedPicklistValue&gt;West &lt;/data:RelatedPicklistValue&gt; &lt;/data:PicklistValueAssociations&gt; . . . &lt;/data:ListOfPicklistValueAssociations&gt; &lt;/data:CascadingPicklist&gt;</pre>

## Migrating Cascading Picklists

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

- [Extracting Cascading Picklists for a Single Object](#)
- [Extracting Cascading Picklists for All Objects](#)
- [Updating or Inserting a Cascading Picklist \(Upsert\)](#)

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

## Extracting Cascading Picklists for a Single Object

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

### Syntax

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

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

where:

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

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

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

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

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

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

## Extracting Cascading Picklists for All Objects

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

### Syntax

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

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

where:

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

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

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

## Example of Extracting Cascading Picklists for All Objects

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

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

## Updating or Inserting a Cascading Picklist (Upsert)

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

### About the Upsert Operation

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

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

- The parent picklist is the same as the related picklist because looping cascades are not allowed.
- The parent or related picklist references a field that does not exist on the target system.
- The parent or related picklist references a field that is not of type Picklist.
- The related picklist references a parent picklist that is already referenced by another related picklist.

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

### Syntax

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

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

where:

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

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

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

## Example of Updating or Inserting a Cascading Picklist

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

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

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

# 10 Migrating Custom Web Link Fields

## Migrating Custom Web Link Fields

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

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

## Custom Web Link Fields

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

The following table describes the Oracle Migration Tool On Demand client commands used with custom Web link fields. For more information about running these commands, see [Migrating Custom Web Link Fields](#).

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

## Privileges Required for Migrating Custom Web Link Fields

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

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

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

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

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

The following table describes the elements and sections in the custom Web links XML output file.

Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
The <ListOfWebLinks> section contains details of the custom Web links.	<code>&lt;data:ListOfWebLinks&gt;</code> . . . <code>&lt;/data:ListOfWebLinks&gt;</code>
The <WebLink> section contains details of one custom Web link.	<code>&lt;data:WebLink&gt;</code> . . . <code>&lt;/data:WebLink&gt;</code>
<Name> contains the system name of the custom Web link.	<code>&lt;data:WebLink&gt;</code> <code>&lt;data:Name&gt;MyWebLink&lt;/data:Name&gt;</code> . . . <code>&lt;/data:WebLink&gt;</code>
<IntegrationTag> contains the custom language-independent integration tag for the custom Web link.	<code>&lt;data:WebLink&gt;</code> . . . <code>&lt;data:IntegrationTag&gt;My_Web_Link&lt;/data:IntegrationTag&gt;</code> . . . <code>&lt;/data:WebLink&gt;</code>
<DisplayText> contains the display text that appears in the custom Web link field.	<code>&lt;data:WebLink&gt;</code> . . . <code>&lt;data:DisplayText&gt;MyDisplayText&lt;/data:DisplayText&gt;</code> . . . <code>&lt;/data:WebLink&gt;</code>
<WebLinkTarget> specifies the behavior when a user clicks the link. This element can have the following values: <ul style="list-style-type: none"> <li><b>Open in Current window.</b> If this value is specified, then in the UI, the linked page opens in the current window.</li> </ul>	<code>&lt;data:WebLink&gt;</code> . . . <code>&lt;data:WebLinkTarget&gt;Open in Custom Tab&lt;/data:WebLinkTarget&gt;</code> . . . <code>&lt;/data:WebLink&gt;</code>



Description	Element or Section
<ul style="list-style-type: none"> <li>• <b>Open in New window.</b> If this value is specified, then in the UI, the linked page opens in a new window.</li> <li>• <b>Open in Custom Tab.</b> If this value is specified, then in the UI, the linked page opens in a custom tab.</li> </ul>	
<p>&lt;TargetCustomWebTab&gt; specifies the custom Web tab, if Open in Custom Tab is specified in &lt;WebLinkTarget&gt;.</p>	<pre>&lt;data:WebLink&gt; . . . &lt;data:TargetCustomWebTab&gt;MyCustomWebTab &lt;/data:TargetCustomWebTab&gt; . . . &lt;/data:WebLink&gt;</pre>
<p>&lt;RefreshParentWindow&gt; specifies whether the parent window is refreshed after the user closes the new window in which the linked page opened (true). This element is applicable only if Open in New window is specified in &lt;WebLinkTarget&gt;.</p>	<pre>&lt;data:WebLink&gt; . . . &lt;data:RefreshParentWindow&gt;&gt;false &lt;/data:RefreshParentWindow&gt; . . . &lt;/data:WebLink&gt;</pre>
<p>&lt;DisplayOptions&gt; specifies the type of page in which the custom Web link can be displayed. This element can have the following values:</p> <ul style="list-style-type: none"> <li>• <b>D.</b> Detail pages only.</li> <li>• <b>E.</b> Edit pages only.</li> <li>• <b>B.</b> Both detail pages and edit pages.</li> </ul>	<pre>&lt;data:WebLink&gt; . . . &lt;data:DisplayOptions&gt;B&lt;/data:DisplayOptions&gt; . . . &lt;/data:WebLink&gt;</pre>
<p>&lt;ActiveLinkCondition&gt; specifies the condition that controls whether the link is active on the detail and edit pages.</p>	<pre>&lt;data:WebLink&gt; . . . &lt;data:ActiveLinkCondition&gt;TRUE &lt;/data:ActiveLinkCondition&gt; . . . &lt;/data:WebLink&gt;</pre>
<p>&lt;DisplayLinkCondition&gt; specifies the condition that controls whether the link is displayed on the detail and edit pages.</p>	<pre>&lt;data:WebLink&gt; . . . &lt;data:DisplayLinkCondition&gt;TRUE &lt;/data:DisplayLinkCondition&gt; . . . &lt;/data:WebLink&gt;</pre>
<p>&lt;Type&gt; defines the type of the custom Web link, which is one of the following:</p> <ul style="list-style-type: none"> <li>• Dashboard</li> <li>• Report</li> <li>• URL</li> </ul>	<pre>&lt;data:Type&gt;&lt;/data:Type&gt;</pre>
<p>If the custom Web link type is Dashboard, then the details appear in the &lt;DashboardType&gt; section, as follows:</p>	<pre>&lt;data:DashboardType&gt; &lt;data:DashboardPath&gt; Company Wide Shared Folder : Dashboards : Accounts Dashboard</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;DashboardPath&gt; contains the path to the dashboard. The dashboard must be located directly in the Dashboards folder under Shared Folders and not at a deeper level.</li> <li>• &lt;DashboardParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web link of the Dashboard type. For information about specifying parameters for embedded dashboards, see <i>Oracle CRM On Demand Online Help</i>.</li> </ul>	<pre> &lt;/data:DashboardPath&gt; &lt;data:DashboardParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%%Row_Id%% &lt;/data:DashboardParameters&gt; &lt;/data:DashboardType&gt;                     </pre>
<p>If the custom Web link type is Report, then the details appear in the &lt;ReportType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;ReportPath&gt; contains the path to the analysis. The analysis must be located under Shared Folders.</li> <li>• &lt;ReportParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web link of the Report type. For information about specifying parameters for embedded analyses, see <i>Oracle CRM On Demand Online Help</i>.</li> </ul> <p><b>Note:</b> If the &lt;ReportPrompts&gt; element is set to true, then any filters that are specified in the &lt;ReportParameters&gt; element are ignored at runtime, even if no prompts are defined for the analysis.</p> <ul style="list-style-type: none"> <li>• &lt;ReportPrompts&gt; corresponds to the Display Report Prompts check box in the UI. It determines whether any prompts that are defined for the analysis are displayed at runtime (true) or are not displayed (false).</li> <li>• &lt;RefreshLink&gt; determines whether the Refresh link that allows users to refresh the data in the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;PrintLink&gt; determines whether the Print link that allows users to print the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;ExportLink&gt; determines whether the Export link that allows users to download the analysis is displayed</li> </ul>	<pre> &lt;data:ReportType&gt; &lt;data:ReportPath&gt; Company Wide Shared Folder : My Company Account Custom Analyses : Account Custom Analysis &lt;/data:ReportPath&gt; &lt;data:ReportParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%%Row_Id%% &lt;/data:ReportParameters&gt; &lt;data:ReportPrompts&gt;&gt;false&lt;/data:ReportPrompts&gt; &lt;data:RefreshLink&gt;&gt;true&lt;/data:RefreshLink&gt; &lt;data:PrintLink&gt;&gt;true&lt;/data:PrintLink&gt; &lt;data:ExportLink&gt;&gt;true&lt;/data:ExportLink&gt; &lt;/data:ReportType&gt;                     </pre>

Description	Element or Section
<p>at runtime (true) or is not displayed (false).</p>	
<p>&lt;URL&gt; specifies the URL that is invoked when the user clicks the custom Web link (for custom Web links of the URL type only).</p> <p><b>Note:</b> Although it is possible to update or insert a custom Web link that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.</p>	<pre>&lt;data:WebLink&gt; . . . &lt;data:URL&gt;http://www.someURL.com&lt;/data:URL&gt; . . . &lt;/data:WebLink&gt;</pre>
<p>The &lt;ListOfWebLinkTranslations&gt; section contains the translation values for the custom Web link.</p>	<pre>&lt;data:WebLink&gt; . . . &lt;data:ListOfWebLinkTranslations&gt; . . . &lt;/data:ListOfWebLinkTranslations&gt; . . . &lt;/data:WebLink&gt;</pre>
<p>The &lt;WebLinkTranslation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;DisplayName&gt; contains the display name for the Web link field in the language identified by the language code.</li> <li>• &lt;DisplayText&gt; contains the display text for the Web link field in the language identified by the language code.</li> <li>• &lt;LangCode&gt; contains the three-letter code for a language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> </ul>	<pre>&lt;data:WebLink&gt; . . . &lt;data:ListOfWebLinkTranslations&gt; &lt;data:WebLinkTranslation&gt; &lt;data:DisplayName&gt;MyWebLink&lt;/data:DisplayName&gt; &lt;data:DisplayText&gt;Click here&lt;/data:DisplayText&gt; &lt;data:LangCode&gt;ENU&lt;/data:LangCode&gt; &lt;/data:WebLinkTranslation&gt; . . . &lt;/data:ListOfWebLinkTranslations&gt; . . . &lt;/data:WebLink&gt;</pre>

## Migrating Custom Web Link Fields

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

- [Extracting Custom Web Link Fields for a Single Object](#)
- [Extracting Custom Web Link Fields for All Objects](#)
- [Updating or Inserting Custom Web Link Fields \(Upsert\)](#)

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

## Extracting Custom Web Link Fields for a Single Object

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

### Syntax

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

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

where:

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

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

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

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

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

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

## Extracting Custom Web Link Fields for All Objects

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

### Syntax

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

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

where:

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

## Example of Extracting All Custom Web Link Fields

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

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

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

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

### Syntax

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

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

where:

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

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

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

## Example of Updating or Inserting Custom Web Link Fields

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

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

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



# 11 Migrating Concatenated Fields

## Migrating Concatenated Fields

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

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

## Concatenated Fields

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

The following table describes the Oracle Migration Tool On Demand client commands used with concatenated fields. For more information about running these commands, see [Migrating Concatenated Fields](#).

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

## Privileges Required for Migrating Concatenated Fields

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

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

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

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

The following table describes the elements and sections in the concatenated fields XML output file.

Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
The <ListOfConcatenatedFields> section contains details of the concatenated fields.	<code>&lt;data:ListOfConcatenatedFields&gt; . . . &lt;/data:ListOfConcatenatedFields&gt;</code>
The <ConcatenatedField> section contains details of one concatenated field.	<code>&lt;data:ConcatenatedField&gt; . . . &lt;/data:ConcatenatedField&gt;</code>
<Name> contains the system name of the concatenated field.	<code>&lt;data:ConcatenatedField&gt; &lt;data:Name&gt;ConcatenatedField&lt;/data:Name&gt; . . . &lt;/data:ConcatenatedField&gt;</code>
<IntegrationTag> contains the custom language-independent integration tag for the concatenated field.	<code>&lt;data:ConcatenatedField&gt; &lt;data:IntegrationTag&gt;MyConcatenatedField &lt;/data:IntegrationTag&gt; . . . &lt;/data:ConcatenatedField&gt;</code>
<DisplayText> contains the specification for the content of the concatenated field.	<code>&lt;data:ConcatenatedField&gt; &lt;data:DisplayText&gt;MyDisplayText&lt;/data:DisplayText&gt; . . . &lt;/data:ConcatenatedField&gt;</code>
The <ListOfConcatenatedFieldTranslations> section contains the translation values for the concatenated field.	<code>&lt;data:ConcatenatedField&gt; &lt;data:ListOfConcatenatedFieldTranslations&gt; . . . &lt;/data:ListOfConcatenatedFieldTranslations&gt; . . . &lt;/data:ConcatenatedField&gt;</code>
The <ConcatenatedFieldTranslation> section contains the translation values for one language. <ul style="list-style-type: none"> <li>&lt;DisplayName&gt; contains the name for the concatenated field in the</li> </ul>	<code>&lt;data:ConcatenatedField&gt; &lt;data:ListOfConcatenatedFieldTranslations&gt; &lt;data:ConcatenatedFieldTranslation&gt; &lt;data:DisplayName&gt;MyConcatenatedField &lt;/data:DisplayName&gt; &lt;data:DisplayText&gt;Field 1 Field 2.</code>



Description	Element or Section
<p>language identified by the language code.</p> <ul style="list-style-type: none"> <li>• &lt;DisplayText&gt; contains the specification for the content of the concatenated field, with the text that appears in the field in the language identified by the language code.</li> <li>• &lt;LangCode&gt; contains the three-letter code for the language. For the list of language codes, see <i>Language Codes and Their Corresponding Language and Country</i>.</li> </ul>	<pre> &lt;/data:DisplayText&gt; &lt;data:LangCode&gt;ENU&lt;/data:LangCode&gt; &lt;/data:ConcatenatedFieldTranslation&gt; . . . &lt;/data:ListOfConcatenatedFieldTranslations&gt; . . . &lt;/data:ConcatenatedField&gt;                     </pre>

## Migrating Concatenated Fields

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

- *Extracting Concatenated Fields for a Single Object*
- *Extracting Concatenated Fields for All Objects*
- *Updating or Inserting Concatenated Fields (Upsert)*

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

### Extracting Concatenated Fields for a Single Object

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

#### Syntax

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

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

where:

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

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

## Example of Extracting Concatenated Fields for a Single Object

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

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

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

## Extracting Concatenated Fields for All Objects

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

### Syntax

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

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

where:

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

## Example of Extracting All Concatenated Fields

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

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

## Updating or Inserting Concatenated Fields (Upsert)

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

### Syntax

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

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

where:

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

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

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

## Example of Updating or Inserting Concatenated Fields

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

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

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



# 12 Migrating Custom Web Applets

## Migrating Custom Web Applets

This chapter describes how to migrate custom Web applets using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Custom Web Applets](#)
- [Privileges Required for Migrating Custom Web Applets](#)
- [Elements and Sections in the Web Applet XML Output File](#)
- [Migrating Custom Web Applets](#)

## Custom Web Applets

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

The following table describes the Oracle Migration Tool On Demand client commands used with custom Web applets. For more information about running these commands, see [Migrating Custom Web Applets](#).

Command	Description
<code>Read HomepageCustomWebApplet</code> <code>SystemNameOfObject</code> <code>[HomePageWebAppletName]</code>	This command exports all the homepage custom Web applets for a specified object, such as Account, or a specific homepage custom Web applet for a specified record type (object), where: <ul style="list-style-type: none"> <li>• <code>SystemNameOfObject</code> is the specified record type. The system names for the record types are listed in <a href="#">System Names for Record Types</a>.</li> <li>• <code>HomePageWebAppletName</code> is the name of a homepage custom Web applet.</li> </ul>
<code>Read DetailPageCustomWebApplet</code> <code>SystemNameOfObject</code> <code>[DetailPageWebAppletName]</code>	This command exports all the detail page custom Web applets for a specified object, such as Account, or a specific detail page custom Web applet for a specified object, where: <ul style="list-style-type: none"> <li>• <code>SystemNameOfObject</code> is the specified record type.</li> <li>• <code>DetailPageWebAppletName</code> is the name of a detail page custom Web applet.</li> </ul>
<code>Read ActionBarCustomWebApplet</code> <code>ActionBarWebAppletName</code>	This command exports the specified Action bar custom Web applet from Oracle CRM On Demand.
<code>Read HomeTabCustomWebApplet</code> <code>HomeTabCustomWebAppletName</code>	This command exports the specified Home tab custom Web applet from Oracle CRM On Demand.
<code>ReadAll WebAppletType</code>	This command exports all custom Web applets of <code>WebAppletType</code> from Oracle CRM On Demand, where <code>WebAppletType</code> is one of the following:

Command	Description
	<ul style="list-style-type: none"> <li>HomepageCustomWebApplet</li> <li>DetailPageCustomWebApplet</li> <li>ActionBarCustomWebApplet</li> <li>HomeTabCustomWebApplet</li> </ul>
<code>Upsert WebAppletType MyWebAppletXML</code>	<p>This command updates or inserts a custom Web applet into Oracle CRM On Demand, where <i>WebAppletType</i> is one of the following:</p> <ul style="list-style-type: none"> <li>HomepageCustomWebApplet</li> <li>DetailPageCustomWebApplet</li> <li>ActionBarCustomWebApplet</li> <li>HomeTabCustomWebApplet</li> </ul>

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

## Privileges Required for Migrating Custom Web Applets

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

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

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

## Elements and Sections in the Web Applet XML Output File

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

- Detail Page Custom Web Applets*
- Action Bar Custom Web Applets*
- Homepage Custom Web Applets*
- Home Tab Custom Web Applets*

## Detail Page Custom Web Applets

The following table describes the elements and sections in the detail page custom Web applet XML output file.

Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
<DisplayName> contains the name of the custom Web applet.	<code>&lt;data:DisplayName&gt;My Account Detail Page Applet&lt;/data:DisplayName&gt;</code>
<DisplayNameCurrentUserLang> contains the name of the custom Web applet in the language of the currently-logged in user.	<code>&lt;data:DisplayNameCurrentUserLang&gt;My Account Detail Page Applet&lt;/data:DisplayNameCurrentUserLang&gt;</code>
<Description> contains the description of the custom Web applet.	<code>&lt;data:Description&gt;&lt;/data:Description&gt;</code>
<Height> specifies the height of the custom Web applet, in pixels.	<code>&lt;data:Height&gt;700&lt;/data:Height&gt;</code>
<p>If the custom Web applet is a Dashboard applet, then the details appear in the &lt;DashboardType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>&lt;DashboardPath&gt; contains the path to the dashboard. The dashboard must be located directly in the Dashboards folder under Shared Folders and not at a deeper level.</li> <li>&lt;DashboardParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web applet of the Dashboard type. For information about specifying parameters for embedded dashboards, see <i>Oracle CRM On Demand Online Help</i>.</li> <li>&lt;AlwaysRun&gt; determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).</li> </ul>	<pre> &lt;data:DashboardType&gt;   &lt;data:DashboardPath&gt; Company Wide Shared Folder : Dashboards : Accounts Dashboard   &lt;/data:DashboardPath&gt;   &lt;data:DashboardParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%%Row_Id%%   &lt;/data:DashboardParameters&gt;   &lt;data:AlwaysRun&gt;&gt;false&lt;/data:AlwaysRun&gt; &lt;/data:DashboardType&gt; </pre>
<p>If the custom Web applet is an HTML applet, then the details appear in the &lt;HTMLType&gt; section, as follows:</p>	<pre> &lt;data:HTMLType&gt;   &lt;data:HTMLHeader&gt;&lt;/data:HTMLHeader&gt;   &lt;data:HTMLBody&gt;&lt;/data:HTMLBody&gt;   &lt;data:AlwaysRun&gt;&gt;false&lt;/data:AlwaysRun&gt; &lt;/data:HTMLType&gt; </pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;HTMLHeader&gt; contains the HTML code used in an &lt;iframe&gt; element within the HTML header of the page to which the custom Web applet is added.</li> <li>• &lt;HTMLBody&gt; contains the HTML code used in an &lt;iframe&gt; element within the HTML body of the page to which the custom Web applet is added.</li> <li>• &lt;AlwaysRun&gt; determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).</li> </ul>	
<p>If the custom Web applet is a Report applet, then the details appear in the &lt;ReportType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;ReportPath&gt; contains the path to the analysis. The analysis must be located under Shared Folders.</li> <li>• &lt;ReportParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web applet of the Report type. For information about specifying parameters for embedded analyses, see <i>Oracle CRM On Demand Online Help</i>.</li> </ul> <p><b>Note:</b> If the &lt;ReportPrompts&gt; element is set to true, then any filters that are specified in the &lt;ReportParameters&gt; element are ignored at runtime, even if no prompts are defined for the analysis.</p> <ul style="list-style-type: none"> <li>• &lt;ReportPrompts&gt; corresponds to the Display Report Prompts check box in the UI. It determines whether any prompts that are defined for the analysis are displayed at runtime (true) or are not displayed (false).</li> <li>• &lt;RefreshLink&gt; determines whether the Refresh link that allows users to refresh the data in the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;PrintLink&gt; determines whether the Print link that allows users to print the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;ExportLink&gt; determines whether the Export link that allows users to</li> </ul>	<pre> &lt;data:ReportType&gt;   &lt;data:ReportPath&gt; Company Wide Shared Folder : My Company Account Custom Analyses : Account Custom Analysis   &lt;/data:ReportPath&gt;   &lt;data:ReportParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%%Row_Id%%   &lt;/data:ReportParameters&gt;   &lt;data:ReportPrompts&gt;&gt;false&lt;/data:ReportPrompts&gt;   &lt;data:RefreshLink&gt;&gt;true&lt;/data:RefreshLink&gt;   &lt;data:PrintLink&gt;&gt;true&lt;/data:PrintLink&gt;   &lt;data:ExportLink&gt;&gt;true&lt;/data:ExportLink&gt;   &lt;data:AlwaysRun&gt;&gt;false&lt;/data:AlwaysRun&gt; &lt;/data:ReportType&gt;                 </pre>



Description	Element or Section
<p>download the analysis is displayed at runtime (true) or is not displayed (false).</p> <ul style="list-style-type: none"> <li>• &lt;AlwaysRun&gt; determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).</li> </ul>	
<p>If the custom Web applet is an RSS feed applet, then the details appear in the &lt;FeedType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;URL&gt; contains the URL that is invoked when the user clicks the hyperlink.</li> <li>• &lt;OverrideURLFlag&gt; determines whether the user can override the URL (true) or the user cannot override the URL (false).</li> <li>• &lt;TargetWindow&gt; specifies the window in which the custom Web applet opens. The valid values are as follows: <ul style="list-style-type: none"> <li>○ <b>Current Window.</b> The custom Web applet opens in the current window.</li> <li>○ <b>New Window.</b> The custom Web applet opens in a new window.</li> </ul> </li> </ul>	<pre>&lt;data:FeedType&gt; &lt;data:URL&gt;&lt;/data:URL&gt; &lt;data:OverrideURLFlag&gt;false&lt;/data:OverrideURLFlag&gt; &lt;data:TargetWindow&gt;New Window&lt;/data:TargetWindow&gt; &lt;/data:FeedType&gt;</pre>
<p>If the custom Web applet is a URL applet, then the details appear in the &lt;URLType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;URL&gt; contains the URL that is invoked when the user clicks the hyperlink.</li> <li>• &lt;AlwaysRun&gt; determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).</li> </ul> <p><b>Note:</b> Although it is possible to update or insert a custom Web applet of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.</p>	<pre>&lt;data:URLType&gt; &lt;data:URL&gt;http://www.oracle.com&lt;/data:URL&gt; &lt;data:AlwaysRun&gt;false&lt;/data:AlwaysRun&gt; &lt;/data:URLType&gt;</pre>
<p>&lt;ModernIconName&gt; contains the file name of the modern theme icon for the custom Web applet. For more information about modern theme icons, see <i>Classic and Modern Theme Icons</i>.</p>	<pre>&lt;data:ModernIconName&gt;mod_account_25.png &lt;/data:ModernIconName&gt;</pre>

Description	Element or Section
The <ListOfTranslation> section contains the translation values for the custom Web applet.	<pre>&lt;data:ListOfTranslation&gt; . . . &lt;/data:ListOfTranslation&gt;</pre>
<p>The &lt;Translation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>&lt;LanguageCode&gt; contains the three-letter code for the language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>&lt;DisplayName&gt; contains the name for the applet in the language identified by the language code.</li> </ul>	<pre>&lt;data:ListOfTranslation&gt; &lt;data:Translation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:DisplayName&gt;My Account Detail PageApplet &lt;/data:DisplayName&gt; &lt;/data:Translation&gt; . . . &lt;/data:ListOfTranslation&gt;</pre>

## Action Bar Custom Web Applets

The following table describes the elements and sections in the Action bar custom Web applet XML output file.

Description	Element or Section
<DisplayName> contains the name of the custom Web applet.	<pre>&lt;data:DisplayName&gt;My Action Bar Applet &lt;/data:DisplayName&gt;</pre>
<DisplayNameCurrentUserLang> contains the name of the custom Web applet in the language of the currently-logged in user.	<pre>&lt;data:DisplayNameCurrentUserLang&gt; My Action Bar Applet &lt;/data:DisplayNameCurrentUserLang&gt;</pre>
<Description> contains the description of the custom Web applet.	<pre>&lt;data:Description&gt;&lt;/data:Description&gt;</pre>
<Height> specifies the height of the custom Web applet, in pixels.	<pre>&lt;data:Height&gt;200&lt;/data:Height&gt;</pre>
<p>If the custom Web applet is a Dashboard applet, then the details appear in the &lt;DashboardType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>&lt;DashboardPath&gt; contains the path to the dashboard. The dashboard must be located directly in the Dashboards folder under Shared Folders and not at a deeper level.</li> <li>&lt;DashboardParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters</li> </ul>	<pre>&lt;data:DashboardType&gt; &lt;data:DashboardPath&gt; Company Wide Shared Folder : Dashboards : Accounts Dashboard &lt;/data:DashboardPath&gt; &lt;data:DashboardParameters&gt; P0=1&amp;P1=eq&amp;P2="Account"."Account ID"&amp;P3=%Row_Id% &lt;/data:DashboardParameters&gt; &lt;data:AlwaysRun&gt;&gt;false&lt;/data:AlwaysRun&gt; &lt;/data:DashboardType&gt;</pre>

Description	Element or Section
<p>is validated when you insert or update a custom Web applet of the Dashboard type. For information about specifying parameters for embedded dashboards, see <i>Oracle CRM On Demand Online Help</i> .</p> <ul style="list-style-type: none"> <li>• &lt;AlwaysRun&gt; determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).</li> </ul>	
<p>If the custom Web applet is an HTML applet, then the details appear in the &lt;HTMLType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;HTMLHeader&gt; contains the HTML code used in an &lt;iframe&gt; element within the HTML header of the page to which the custom Web applet is added.</li> <li>• &lt;HTMLBody&gt; contains the HTML code used in an &lt;iframe&gt; element within the HTML body of the page to which the custom Web applet is added.</li> <li>• &lt;AlwaysRun&gt; determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).</li> </ul>	<pre>&lt;data:HTMLType&gt;   &lt;data:HTMLHeader&gt;&lt;/data:HTMLHeader&gt;   &lt;data:HTMLBody&gt;&lt;/data:HTMLBody&gt;   &lt;data:AlwaysRun&gt;false&lt;/data:AlwaysRun&gt; &lt;/data:HTMLType&gt;</pre>
<p>If the custom Web applet is a Report applet, then the details appear in the &lt;ReportType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;ReportPath&gt; contains the path to the analysis. The analysis must be located under Shared Folders.</li> <li>• &lt;ReportParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web applet of the Report type. For information about specifying parameters for embedded analyses, see <i>Oracle CRM On Demand Online Help</i> .</li> <li>• &lt;RefreshLink&gt; determines whether the Refresh link that allows users to refresh the data in the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;PrintLink&gt; determines whether the Print link that allows users to print the analysis is displayed at runtime (true) or is not displayed (false).</li> </ul>	<pre>&lt;data:ReportType&gt;   &lt;data:ReportPath&gt; Company Wide Shared Folder : My Company Account Custom Analyses : Account Custom Analysis   &lt;/data:ReportPath&gt;   &lt;data:ReportParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%%Row_Id%%   &lt;/data:ReportParameters&gt;   &lt;data:RefreshLink&gt;true&lt;/data:RefreshLink&gt;   &lt;data:PrintLink&gt;true&lt;/data:PrintLink&gt;   &lt;data:ExportLink&gt;true&lt;/data:ExportLink&gt;   &lt;data:AlwaysRun&gt;false&lt;/data:AlwaysRun&gt; &lt;/data:ReportType&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;ExportLink&gt; determines whether the Export link that allows users to download the analysis is displayed at runtime (true) or is not displayed (false).</li> </ul> <p><b>Note:</b> Displaying prompts for an analysis is not supported for Report applets in the Action bar, therefore the &lt;ReportPrompts&gt; element is not applicable for a Report applet in the Action bar.</p> <ul style="list-style-type: none"> <li>• &lt;AlwaysRun&gt; determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).</li> </ul>	
<p>If the custom Web applet is an RSS feed applet, then the details appear in the &lt;FeedType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;URL&gt; contains the URL that is invoked when the user clicks the hyperlink.</li> <li>• &lt;OverrideURLFlag&gt; determines whether the user can override the URL (true) or the user cannot override the URL (false).</li> <li>• &lt;TargetWindow&gt; specifies the window in which the custom Web applet opens. The valid values are as follows: <ul style="list-style-type: none"> <li>• <b>Current Window.</b> The custom Web applet opens in the current window.</li> <li>• <b>New Window.</b> The custom Web applet opens in a new window.</li> </ul> </li> </ul>	<pre>&lt;data:FeedType&gt;   &lt;data:URL&gt;&lt;/data:URL&gt;   &lt;data:OverrideURLFlag&gt;false&lt;/data:OverrideURLFlag&gt;   &lt;data:TargetWindow&gt;New Window &lt;/data:TargetWindow&gt; &lt;/data:FeedType&gt;</pre>
<p>If the custom Web applet is a URL applet, then the details appear in the &lt;URLType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;URL&gt; contains the URL that is invoked when the user clicks the hyperlink.</li> <li>• &lt;AlwaysRun&gt; determines whether the custom Web applet will be executed if the applet is minimized (true) or will not be executed if the applet is minimized (false).</li> </ul>	<pre>&lt;data:URLType&gt;   &lt;data:URL&gt;http://www.oracle.com&lt;/data:URL&gt;   &lt;data:AlwaysRun&gt;false&lt;/data:AlwaysRun&gt; &lt;/data:URLType&gt;</pre>

Description	Element or Section
<p><b>Note:</b> Although it is possible to update or insert a custom Web applet of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.</p>	
<p>The &lt;ListOfTranslation&gt; section contains the translation values for the custom Web applet.</p>	<pre>&lt;data:ListOfTranslation&gt; . . . &lt;/data:ListOfTranslation&gt;</pre>
<p>The &lt;Translation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter code for the language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>• &lt;DisplayName&gt; contains the name for the applet in the language identified by the language code.</li> </ul>	<pre>&lt;data:ListOfTranslation&gt;   &lt;data:Translation&gt;     &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt;     &lt;data:DisplayName&gt;My Action Bar Applet   &lt;/data:Translation&gt;   . . . &lt;/data:ListOfTranslation&gt;</pre>

## Homepage Custom Web Applets

The following table describes the elements and sections in the homepage custom Web applet XML output file.

Description	Element or Section
<p>&lt;ObjectName&gt; contains the system name of the record type (object), which never changes.</p>	<pre>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</pre>
<p>&lt;DisplayName&gt; contains the name of the custom Web applet.</p>	<pre>&lt;data:DisplayName&gt;My Account Homepage Applet &lt;/data:DisplayName&gt;</pre>
<p>&lt;DisplayNameCurrentUserLang&gt; contains the name of the custom Web applet in the language of the currently-logged in user.</p>	<pre>&lt;data:DisplayNameCurrentUserLang&gt;   My Account Homepage Applet &lt;/data:DisplayNameCurrentUserLang&gt;</pre>
<p>&lt;Description&gt; contains the description of the custom Web applet.</p>	<pre>&lt;data:Description&gt;   This is my Account Homepage applet &lt;/data:Description&gt;</pre>
<p>&lt;Width&gt; specifies the column width of the custom Web applet, as follows:</p> <ul style="list-style-type: none"> <li>• 1. Specifies single-column width.</li> </ul>	<pre>&lt;data:Width&gt;1&lt;/data:Width&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>2. Specifies double-column width.</li> </ul>	
<p>&lt;Height&gt; specifies the height of the custom Web applet, in pixels.</p>	<pre>&lt;data:Height&gt;700&lt;/data:Height&gt;</pre>
<p>If the custom Web applet is a Dashboard applet, then the details appear in the &lt;DashboardType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>&lt;DashboardPath&gt; contains the path to the dashboard. The dashboard must be located directly in the Dashboards folder under Shared Folders and not at a deeper level.</li> <li>&lt;DashboardParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web applet of the Dashboard type. For information about specifying parameters for embedded dashboards, see <i>Oracle CRM On Demand Online Help</i>.</li> </ul>	<pre>&lt;data:DashboardType&gt; &lt;data:DashboardPath&gt; Company Wide Shared Folder : Dashboards : Accounts Dashboard &lt;/data:DashboardPath&gt; &lt;data:DashboardParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%%Row_Id%% &lt;/data:DashboardParameters&gt; &lt;/data:DashboardType&gt;</pre>
<p>If the custom Web applet is an HTML applet, then the details appear in the &lt;HTMLType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>&lt;HTMLHeader&gt; contains the HTML code used in an &lt;iframe&gt; element within the HTML header of the page to which the custom Web applet is added.</li> <li>&lt;HTMLBody&gt; contains the HTML code used in an &lt;iframe&gt; element within the HTML body of the page to which the custom Web applet is added.</li> </ul>	<pre>&lt;data:HTMLType&gt; &lt;data:HTMLHeader&gt;&lt;/data:HTMLHeader&gt; &lt;data:HTMLBody&gt;&lt;/data:HTMLBody&gt; &lt;/data:HTMLType&gt;</pre>
<p>If the custom Web applet is a record-type homepage custom report, then the details appear in the &lt;ReportType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>&lt;ReportPath&gt; contains the path to the analysis. The analysis must be located under Shared Folders.</li> <li>&lt;ReportFlag&gt; specifies whether the report will run automatically (true) or if users will have to click a link to refresh the report (false).</li> <li>&lt;ReportPrompts&gt; corresponds to the Display Report Prompts check box in the UI. It determines whether any prompts that are defined for the</li> </ul>	<pre>&lt;data:ReportType&gt; &lt;data:ReportPath&gt; Company Wide Shared Folder : My Company Account Custom Analyses : Account Custom Analysis &lt;/data:ReportPath&gt; &lt;data:ReportFlag&gt;true&lt;/data:ReportFlag&gt; &lt;data:ReportPrompts&gt;&gt;false&lt;/data:ReportPrompts&gt; &lt;data:RefreshLink&gt;true&lt;/data:RefreshLink&gt; &lt;data:PrintLink&gt;true&lt;/data:PrintLink&gt; &lt;data:ExportLink&gt;true&lt;/data:ExportLink&gt; &lt;/data:ReportType&gt;</pre>

Description	Element or Section
<p>analysis are displayed at runtime (true) or are not displayed (false).</p> <ul style="list-style-type: none"> <li>• &lt;RefreshLink&gt; determines whether the Refresh link that allows users to refresh the data in the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;PrintLink&gt; determines whether the Print link that allows users to print the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;ExportLink&gt; determines whether the Export link that allows users to download the analysis is displayed at runtime (true) or is not displayed (false).</li> </ul>	
<p>If the custom Web applet is a Report applet, then the details appear in the &lt;WebAppletReportType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;ReportPath&gt; contains the path to the analysis. The analysis must be located under Shared Folders.</li> <li>• &lt;ReportParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web applet of the Report type. For information about specifying parameters for embedded analyses, see <i>Oracle CRM On Demand Online Help</i>.</li> </ul> <p><b>Note:</b> If the &lt;ReportPrompts&gt; element is set to true, then any filters that are specified in the &lt;ReportParameters&gt; element are ignored at runtime, even if no prompts are defined for the analysis.</p> <ul style="list-style-type: none"> <li>• &lt;ReportPrompts&gt; corresponds to the Display Report Prompts check box in the UI. It determines whether any prompts that are defined for the analysis are displayed at runtime (true) or are not displayed (false).</li> <li>• &lt;RefreshLink&gt; determines whether the Refresh link that allows users to refresh the data in the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;PrintLink&gt; determines whether the Print link that allows users to print the analysis is displayed at runtime (true) or is not displayed (false).</li> </ul>	<pre> &lt;data:WebAppletReportType&gt;   &lt;data:ReportPath&gt; Company Wide Shared Folder : My Company Account Custom Analyses : Account Custom Analysis   &lt;/data:ReportPath&gt;   &lt;data:ReportParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%%%Row_Id%%   &lt;/data:ReportParameters&gt;   &lt;data:ReportPrompts&gt;&gt;false&lt;/data:ReportPrompts&gt;   &lt;data:RefreshLink&gt;&gt;true&lt;/data:RefreshLink&gt;   &lt;data:PrintLink&gt;&gt;true&lt;/data:PrintLink&gt;   &lt;data:ExportLink&gt;&gt;true&lt;/data:ExportLink&gt; &lt;/data:WebAppletReportType&gt; </pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;ExportLink&gt; determines whether the Export link that allows users to download the analysis is displayed at runtime (true) or is not displayed (false).</li> </ul>	
<p>If the custom Web applet is an RSS feed applet, then the details appear in the &lt;FeedType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;URL&gt; contains the URL that is invoked when the user clicks the hyperlink.</li> <li>• &lt;OverrideURLFlag&gt; determines whether the user can override the URL (true) or the user cannot override the URL (false).</li> <li>• &lt;TargetWindow&gt; specifies the window in which the custom Web applet opens. The valid values are as follows: <ul style="list-style-type: none"> <li>• <b>Current Window.</b> The custom Web applet opens in the current window.</li> <li>• <b>New Window.</b> The custom Web applet opens in a new window.</li> </ul> </li> </ul>	<pre>&lt;data:FeedType&gt; &lt;data:URL&gt;&lt;/data:URL&gt; &lt;data:OverrideURLFlag&gt;&gt;false&lt;/data:OverrideURLFlag&gt; &lt;data:TargetWindow&gt;New Window&lt;/data:TargetWindow&gt; &lt;/data:FeedType&gt;</pre>
<p>If the custom Web applet is a URL applet, then the details appear in the &lt;URLType&gt; section.</p> <p>&lt;URL&gt; contains the URL that is invoked when the user clicks the hyperlink.</p> <p><b>Note:</b> Although it is possible to update or insert a custom Web applet of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.</p>	<pre>&lt;data:URLType&gt; &lt;data:URL&gt;http://www.oracle.com&lt;/data:URL&gt; &lt;/data:URLType&gt;</pre>
<p>The &lt;ListOfTranslation&gt; section contains the translation values for the custom Web applet.</p>	<pre>&lt;data:ListOfTranslation&gt; . . . &lt;/data:ListOfTranslation&gt;</pre>
<p>The &lt;Translation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter code for the language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>• &lt;DisplayName&gt; contains the name for the applet in the language identified by the language code.</li> </ul>	<pre>&lt;data:ListOfTranslation&gt; &lt;data:Translation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:DisplayName&gt;My Account Homepage Applet &lt;/data:DisplayName&gt; &lt;/data:Translation&gt; . . . &lt;/data:ListOfTranslation&gt;</pre>



## Home Tab Custom Web Applets

The following table describes the elements and sections in the Home tab custom Web applet XML output file.

Description	Element or Section
<p>&lt;DisplayName&gt; contains the name of the custom Web applet.</p>	<pre>&lt;data:DisplayName&gt;MyHomepage Applet &lt;/data:DisplayName&gt;</pre>
<p>&lt;DisplayNameCurrentUserLang&gt; contains the name of the custom Web applet in the language of the currently-logged in user.</p>	<pre>&lt;data:DisplayNameCurrentUserLang&gt; MyHomepage Applet &lt;/data:DisplayNameCurrentUserLang&gt;</pre>
<p>&lt;Description&gt; contains the description of the custom Web applet.</p>	<pre>&lt;data:Description&gt;This is my MyHomepage applet &lt;/data:Description&gt;</pre>
<p>&lt;Width&gt; specifies the column width of the custom Web applet, as follows:</p> <ul style="list-style-type: none"> <li>• 1. Specifies single-column width.</li> <li>• 2. Specifies double-column width.</li> </ul>	<pre>&lt;data:Width&gt;1&lt;/data:Width&gt;</pre>
<p>&lt;Height&gt; specifies the height of the custom Web applet, in pixels.</p>	<pre>&lt;data:Height&gt;700&lt;/data:Height&gt;</pre>
<p>If the custom Web applet is a Dashboard applet, then the details appear in the &lt;DashboardType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;DashboardPath&gt; contains the path to the dashboard. The dashboard must be located directly in the Dashboards folder under Shared Folders and not at a deeper level.</li> <li>• &lt;DashboardParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web applet of the Dashboard type. For information about specifying parameters for embedded dashboards, see <i>Oracle CRM On Demand Online Help</i>.</li> </ul>	<pre>&lt;data:DashboardType&gt; &lt;data:DashboardPath&gt; Company Wide Shared Folder : Dashboards : Accounts Dashboard &lt;/data:DashboardPath&gt; &lt;data:DashboardParameters&gt; P0=1&amp;amp;P1=eq&amp;amp;P2="Account"."Account ID"&amp;amp;P3=%%Row_Id%% &lt;/data:DashboardParameters&gt; &lt;/data:DashboardType&gt;</pre>
<p>If the custom Web applet is an HTML applet, then the details appear in the &lt;HTMLType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;HTMLHeader&gt; contains the HTML code used in an &lt;iframe&gt; element within the HTML header of the page</li> </ul>	<pre>&lt;data:HTMLType&gt; &lt;data:HTMLHeader&gt;&lt;/data:HTMLHeader&gt; &lt;data:HTMLBody&gt;&lt;/data:HTMLBody&gt; &lt;/data:HTMLType&gt;</pre>

Description	Element or Section
<p>to which the custom Web applet is added.</p> <ul style="list-style-type: none"> <li>• &lt;HTMLBody&gt; contains the HTML code used in an &lt;iframe&gt; element within the HTML body of the page to which the custom Web applet is added.</li> </ul>	
<p>If the custom Web applet is a My Homepage custom report, then the details appear in the &lt;ReportType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;ReportPath&gt; contains the path to the analysis. The analysis must be located under Shared Folders.</li> <li>• &lt;ReportFlag&gt; specifies whether the report will run automatically (true) or if users will have to click a link to refresh the report (false).</li> <li>• &lt;ReportPrompts&gt; corresponds to the Display Report Prompts check box in the UI. It determines whether any prompts that are defined for the analysis are displayed at runtime (true) or are not displayed (false).</li> <li>• &lt;RefreshLink&gt; determines whether the Refresh link that allows users to refresh the data in the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;PrintLink&gt; determines whether the Print link that allows users to print the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;ExportLink&gt; determines whether the Export link that allows users to download the analysis is displayed at runtime (true) or is not displayed (false).</li> </ul>	<pre> &lt;data:ReportType&gt;   &lt;data:ReportPath&gt; Company Wide Shared Folder : My Company Account Custom Analyses : Account Custom Analysis   &lt;/data:ReportPath&gt;   &lt;data:ReportFlag&gt;&gt;false&lt;/data:ReportFlag&gt;   &lt;data:ReportPrompts&gt;&gt;false&lt;/data:ReportPrompts&gt;   &lt;data:RefreshLink&gt;&gt;true&lt;/data:RefreshLink&gt;   &lt;data:PrintLink&gt;&gt;true&lt;/data:PrintLink&gt;   &lt;data:ExportLink&gt;&gt;true&lt;/data:ExportLink&gt; &lt;/data:ReportType&gt; </pre>
<p>If the custom Web applet is a Report applet, then the details appear in the &lt;WebAppletReportType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;ReportPath&gt; contains the path to the analysis. The analysis must be located under Shared Folders.</li> <li>• &lt;ReportParameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update a custom Web applet of the Report type. For information about specifying parameters for</li> </ul>	<pre> &lt;data:WebAppletReportType&gt;   &lt;data:ReportPath&gt; Company Wide Shared Folder : My Company Account Custom Analyses : Account Custom Analysis   &lt;/data:ReportPath&gt;   &lt;data:ReportParameters&gt; P0=1&amp;P1=eq&amp;P2="Account"."Account ID"&amp;P3=%%Row_Id%%   &lt;/data:ReportParameters&gt;   &lt;data:ReportPrompts&gt;&gt;false&lt;/data:ReportPrompts&gt;   &lt;data:RefreshLink&gt;&gt;true&lt;/data:RefreshLink&gt;   &lt;data:PrintLink&gt;&gt;true&lt;/data:PrintLink&gt;   &lt;data:ExportLink&gt;&gt;true&lt;/data:ExportLink&gt; &lt;/data:WebAppletReportType&gt; </pre>

Description	Element or Section
<p>embedded analyses, see <i>Oracle CRM On Demand Online Help</i> .</p> <p><b>Note:</b> If the &lt;ReportPrompts&gt; element is set to true, then any filters that are specified in the &lt;ReportParameters&gt; element are ignored at runtime, even if no prompts are defined for the analysis.</p> <ul style="list-style-type: none"> <li>• &lt;ReportPrompts&gt; corresponds to the Display Report Prompts check box in the UI. It determines whether any prompts that are defined for the analysis are displayed at runtime (true) or are not displayed (false).</li> <li>• &lt;RefreshLink&gt; determines whether the Refresh link that allows users to refresh the data in the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;PrintLink&gt; determines whether the Print link that allows users to print the analysis is displayed at runtime (true) or is not displayed (false).</li> <li>• &lt;ExportLink&gt; determines whether the Export link that allows users to download the analysis is displayed at runtime (true) or is not displayed (false).</li> </ul>	
<p>If the custom Web applet is an RSS feed applet, then the details appear in the &lt;FeedType&gt; section, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;URL&gt; contains the URL that is invoked when the user clicks the hyperlink.</li> <li>• &lt;OverrideURLFlag&gt; determines whether the user can override the URL (true) or the user cannot override the URL (false).</li> <li>• &lt;TargetWindow&gt; specifies the window in which the custom Web applet opens. The valid values are as follows:                     <ul style="list-style-type: none"> <li>• <b>Current Window.</b> The custom Web applet opens in the current window.</li> <li>• <b>New Window.</b> The custom Web applet opens in a new window.</li> </ul> </li> </ul>	<pre>&lt;data:FeedType&gt; &lt;data:URL&gt;&lt;/data:URL&gt; &lt;data:OverrideURLFlag&gt;false&lt;/data:OverrideURLFlag&gt; &lt;data:TargetWindow&gt;New Window&lt;/data:TargetWindow&gt; &lt;/data:FeedType&gt;</pre>
<p>If the custom Web applet is a URL applet, then the details appear in the &lt;URLType&gt; section.</p> <p>&lt;URL&gt; contains the URL that is invoked when the user clicks the hyperlink.</p>	<pre>&lt;data:URLType&gt; &lt;data:URL&gt;http://www.oracle.com&lt;/data:URL&gt; &lt;/data:URLType&gt;</pre>

Description	Element or Section
<p><b>Note:</b> Although it is possible to update or insert a custom Web applet of the URL type that contains a URL for an analysis or dashboard, this functionality is not fully supported, and the URL might not work after an upgrade.</p>	
<p>The &lt;ListOfTranslation&gt; section contains the translation values for the custom Web applet.</p>	<pre>&lt;data:ListOfTranslation&gt; &lt;data:Translation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:DisplayName&gt;MyHomepage Applet &lt;/data:DisplayName&gt; &lt;/data:Translation&gt; . . . &lt;/data:ListOfTranslation&gt;</pre>
<p>The &lt;Translation&gt; section contains the translation values for one language.</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter code for the language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>• &lt;DisplayName&gt; contains the name for the applet in the language identified by the language code.</li> </ul>	<pre>&lt;data:ListOfTranslation&gt; &lt;data:Translation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:DisplayName&gt;MyHomepage Applet &lt;/data:DisplayName&gt; &lt;/data:Translation&gt; . . . &lt;/data:ListOfTranslation&gt;</pre>

## Migrating Custom Web Applets

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

- [Extracting a Single Custom Web Applet](#)
- [Extracting a Set of Custom Web Applets for a Single Object](#)
- [Extracting All Custom Web Applets](#)
- [Updating or Inserting a Custom Web Applet Definition \(Upsert\)](#)

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

### Extracting a Single Custom Web Applet

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

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

## Syntax for Extracting a Single Detail Page Custom Web Applet

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single detail page custom Web applet:

```
migrationtool -u UserID -s ServerURL Read DetailPageCustomWebApplet SystemNameOfObject DetailPageWebAppletName
```

where:

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

## Syntax for Extracting a Single Action Bar Custom Web Applet

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single Action bar custom Web applet:

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

where:

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

## Syntax for Extracting a Single Homepage Custom Web Applet

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

```
migrationtool -u UserID -s ServerURL Read HomepageCustomWebApplet SystemNameOfObject HomePageWebAppletName
```

where:

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

- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract the custom Web applet, for example, Account. The system names for the record types are listed in *System Names for Record Types*.
- *HomePageWebAppletName* is the name of the homepage custom Web applet that you want to extract.

## Syntax for Extracting a Single Home Tab Custom Web Applet

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

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

where:

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

## Extracting a Set of Custom Web Applets for a Single Object

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

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

## Syntax for Extracting All Detail Page Custom Web Applets for a Single Object

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all detail page custom Web applets for a specified record type:

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

where:

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

## Syntax for Extracting All Homepage Custom Web Applets for a Single Object

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all homepage custom Web applets for a specified record type:

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

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to read a set of custom Web applets, for example, Account. The system names for the record types are listed in *System Names for Record Types*.

## Extracting All Custom Web Applets

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

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

### Syntax

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

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

where:

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

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

The output from the Oracle Migration Tool On Demand client is saved in the following directory:

```
...\repository\WebAppletType\Object\WebApplet.xml
```

where:

- *WebAppletType* is one of the following:
  - HomepageCustomWebApplet
  - DetailPageCustomWebApplet
  - ActionBarCustomWebApplet

- HomeTabCustomWebApplet
  - *Object* is the Oracle CRM On Demand object or record, for example, Account.
  - *WebApplet.xml* is the series of XML files where the Web applet configuration data is stored, for example, First Web Applet.xml file, Second Web Applet.xml file, and so on.

## Example of Extracting All Custom Web Applets for Homepages

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

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

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

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

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

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

The following table shows the result of an Upsert operation if the target company has a Web applet called My Custom Applet for the Account object on the detail page.

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



If the XML definition contains...	Then the result is ...
Object: Global  Location: Action Bar	<ul style="list-style-type: none"> <li>• For the Account object: My Custom Applet</li> <li>• For the Global Web Applet section: My Custom Applet</li> </ul>

## Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert WebAppletType MyWebAppletXML
```

where:

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

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

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

## Examples of Updating or Inserting a Custom Web Applet

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

- For homepage custom Web applets:

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

- For Detail page custom Web applets:

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

- For Action bar custom Web applets:

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

- For Home tab custom Web applets:

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

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

# 13 Migrating Sales Assessment Templates

## Migrating Sales Assessment Templates

This chapter describes how to migrate sales assessment templates using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

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

## Sales Assessment Templates

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

The following table describes the Oracle Migration Tool On Demand client commands used with sales assessment templates. For more information about running these commands, see [Migrating Sales Assessment Templates](#).

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

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

# Privileges Required for Migrating Sales Assessment Templates

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

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

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

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

The following table describes the elements and sections in the sales assessment template XML output file.

Description	Element or Section
<Name> specifies the name of the sales assessment template.	<data:Name>MyAssessment</data:Name>
<Active> specifies whether the sales assessment template is active (true) or inactive (false).	<data:Active>>true</data:Active>
The <Filtern> elements specify the filters that are used to identify which assessment script is the appropriate one to present to a user for a task.	<data:Filter1></data:Filter1> <data:Filter2></data:Filter2> <data:Filter3></data:Filter3> <data:Filter4></data:Filter4>
<AttributeValueNumber> shows the maximum number of answers specified for a question in the assessment script. This element is read-only and is ignored for upsert requests.	<data:AttributeValueNumber></data:AttributeValueNumber>
<ChildScore> shows the maximum score for the first question, which is calculated by multiplying the weight of the first question by the highest score specified for an answer for the first question. This element is read-only and is ignored for upsert requests.	<data:ChildScore></data:ChildScore>

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

Description	Element or Section
<p>&lt;ThresholdScore&gt; specifies the threshold that is used to calculate the outcome of the script. If the score is equal to or higher than the threshold, then the outcome is met.</p>	<pre>&lt;data:ThresholdScore&gt;40&lt;/data:ThresholdScore&gt;</pre>
<p>&lt;Type&gt; specifies the type of the assessment script. The valid values are:</p> <ul style="list-style-type: none"> <li>• Account Survey</li> <li>• Activity Assessment</li> <li>• BusinessPlan Assessment</li> <li>• Contact Script</li> <li>• Lead Qualification</li> <li>• Objective Assessment</li> <li>• Opportunity Assessment</li> <li>• Service Request - Script</li> <li>• Service Request - Survey</li> </ul>	<pre>&lt;data:Type&gt;Account Survey&lt;/data:Type&gt;</pre>
<p>&lt;TemplateType&gt; specifies the record type of the assessment script. This element is always set to Assessment, is read-only, and is ignored for upsert requests.</p>	<pre>&lt;data:TemplateType&gt;Assessment&lt;/data:TemplateType&gt;</pre>
<p>The &lt;ListOfSalesAssessmentTemplateAttribute&gt; section contains the details of the criteria specified for the sales assessment template.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt; . . . &lt;/data:ListOfSalesAssessmentTemplateAttribute&gt;</pre>
<p>The &lt;SalesAssessmentTemplateAttribute&gt; section contains the details of one criterion for the assessment.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt;   &lt;data:SalesAssessmentTemplateAttribute&gt;   . . .   &lt;/data:SalesAssessmentTemplateAttribute&gt; . . . &lt;/data:ListOfSalesAssessmentTemplateAttribute&gt;</pre>
<p>&lt;Question&gt; specifies a question to be answered by the user.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt;   &lt;data:SalesAssessmentTemplateAttribute&gt;     &lt;data:Question&gt;&lt;/data:Question&gt;   . . .   &lt;/data:SalesAssessmentTemplateAttribute&gt; . . . &lt;/data:ListOfSalesAssessmentTemplateAttribute&gt;</pre>
<p>&lt;CriteriaName&gt; contains a descriptive name for the question.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt;   &lt;data:SalesAssessmentTemplateAttribute&gt;   . . .   &lt;data:CriteriaName&gt;&lt;/data:CriteriaName&gt;   . . .   &lt;/data:SalesAssessmentTemplateAttribute&gt; . . .</pre>

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

Description	Element or Section
<p>&lt;ParentType&gt; shows the type of the sales assessment to which the question belongs. This element is read-only and is ignored for upsert requests.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt; &lt;data:SalesAssessmentTemplateAttribute&gt; . . . &lt;data:ParentType&gt;Account Survey &lt;/data:ParentType&gt; . . . &lt;/data:SalesAssessmentTemplateAttribute&gt; . . . &lt;/data:ListOfSalesAssessmentTemplateAttribute&gt;</pre>
<p>&lt;Weight&gt; specifies a percentage value that indicates the importance of the question. The sum of the weights for all questions must equal 100.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt; &lt;data:SalesAssessmentTemplateAttribute&gt; . . . &lt;data:Weight&gt;50&lt;/data:Weight&gt; . . . &lt;/data:SalesAssessmentTemplateAttribute&gt; . . . &lt;/data:ListOfSalesAssessmentTemplateAttribute&gt;</pre>
<p>&lt;WeightxScore&gt; is the maximum score for the question. It is calculated by multiplying the weight of the question by the highest score assigned to an answer for the question. This element is read-only and is ignored for upsert requests.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt; &lt;data:SalesAssessmentTemplateAttribute&gt; . . . &lt;data:WeightxScore&gt;5000&lt;/data:WeightxScore&gt; . . . &lt;/data:SalesAssessmentTemplateAttribute&gt; . . . &lt;/data:ListOfSalesAssessmentTemplateAttribute&gt;</pre>
<p>The &lt;ListOfSalesAssessmentAttributeValue&gt; section contains the elements for the Answer section of the Assessment Script template.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt; &lt;data:SalesAssessmentTemplateAttribute&gt; . . . &lt;data:ListOfSalesAssessmentAttributeValue&gt; . . . &lt;/data:ListOfSalesAssessmentAttributeValue&gt; . . . &lt;/data:SalesAssessmentTemplateAttribute&gt; . . . &lt;/data:ListOfSalesAssessmentTemplateAttribute&gt;</pre>
<p>The &lt;SalesAssessmentAttributeValue&gt; section contains the details of one answer, in the following elements:</p> <ul style="list-style-type: none"> <li>&lt;Order&gt; indicates the position of this answer in the sequence of the answers presented to the user when completing the assessment.</li> <li>&lt;Answer&gt; contains the answer for the question.</li> <li>&lt;Score&gt; contains the score for the answer.</li> </ul> <p><b>Note:</b> The Description element in this section is not used.</p>	<pre>&lt;data:ListOfSalesAssessmentTemplateAttribute&gt; &lt;data:SalesAssessmentTemplateAttribute&gt; . . . &lt;data:ListOfSalesAssessmentAttributeValue&gt; &lt;data:SalesAssessmentAttributeValue&gt; &lt;data:Description&gt;&lt;/data:Description&gt; &lt;data:Order&gt;1&lt;/data:Order&gt; &lt;data:Answer&gt;&lt;/data:Answer&gt; &lt;data:Score&gt;100&lt;/data:Score&gt; &lt;/data:SalesAssessmentAttributeValue&gt; . . . &lt;/data:ListOfSalesAssessmentAttributeValue&gt; . . . &lt;/data:SalesAssessmentTemplateAttribute&gt; . . . &lt;/data:ListOfSalesAssessmentTemplateAttribute&gt;</pre>



# Migrating Sales Assessment Templates

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

- *Extracting a Sales Assessment Template Configuration*
- *Extracting All Sales Assessment Templates*
- *Updating or Inserting a Specific Sales Assessment Template (Upsert)*

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

## Extracting a Sales Assessment Template Configuration

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

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

### Syntax

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

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

where:

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

- **Service Request - Survey.** Service request survey assessment template configuration data.

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

## Example of Extracting Activity Assessment Template

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

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

## Extracting All Sales Assessment Templates

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

### Syntax

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

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

where:

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

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

The output from the Oracle Migration Tool On Demand client is saved in the following directory:

```
...\repository\SalesAssessmentTemplate\Object\assessmentname.xml
```

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

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

## Example of Extracting All Sales Assessment Template Configuration Data

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

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

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

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

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

### Syntax

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

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

where:

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

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

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

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

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

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

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



# 14 Migrating Homepage Layouts

## Migrating Homepage Layouts

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

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

## Homepage Layouts

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

The following table describes the Oracle Migration Tool On Demand client commands used with homepage layouts. For more information about running these commands, see [Extracting All Homepage Layouts](#).

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

## Privileges Required for Migrating Homepage Layouts

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

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

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

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

The following table describes the elements and sections in the homepage layout XML output file.

Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
<LayoutName> contains the name of the homepage layout.	<code>&lt;data:LayoutName&gt;Account Default Layout&lt;/data:LayoutName&gt;</code>
<Description> contains a description of the homepage layout.	<code>&lt;data:Description&gt;My Account Homepage Layout&lt;/data:Description&gt;</code>
The <ListOfAvailableSection> section contains the details of the sections that are included in the Available Sections list in the homepage layout.	<code>&lt;data:ListOfAvailableSection&gt; . . .&lt;/data:ListOfAvailableSection&gt;</code>
<p>The &lt;AvailableSection&gt; section contains the details of one section that is in the Available Sections list in the homepage layout:</p> <ul style="list-style-type: none"> <li>&lt;SectionName&gt; contains an internal applet name that is associated with the SectionLayoutName. Do not modify this element.</li> <li>&lt;SectionLayoutName&gt; contains the section layout name.</li> </ul> <p><b>Note:</b> The section layout name is the name of a homepage section in the layout. This name is not the same as the display name of the section as it appears in the Homepage Layout wizard. For reference information about the mapping of section layout names to the corresponding UI names, see <a href="#">Homepage Section Layout Mapping</a>.</p>	<code>&lt;data:ListOfAvailableSection&gt; &lt;data:AvailableSection&gt; &lt;data:SectionName&gt;AccountRecentlyApplet&lt;/data:SectionName&gt; &lt;data:SectionLayoutName&gt; MyRecentlyModifiedAccounts &lt;/data:SectionLayoutName&gt; &lt;/data:AvailableSection&gt; . . .&lt;/data:ListOfAvailableSection&gt;</code>
The <ListOfSelectedSection> section contains the details of the sections that are included in the Left Side and Right Side lists in the homepage layout.	<code>&lt;data:ListOfSelectedSection&gt; . . .&lt;/data:ListOfSelectedSection&gt;</code>

Description	Element or Section
<p>The &lt;SelectedSection&gt; section contains details of one section that is in either the Left Side list or the Right Side list in the homepage layout:</p> <ul style="list-style-type: none"> <li>• &lt;SectionName&gt; contains an internal applet name that is associated with the SectionLayoutName. Do not modify this element.</li> <li>• &lt;SectionLayoutName&gt; contains the section layout name.</li> </ul> <p><b>Note:</b> The section layout name is the name of a homepage section in the layout. This name is not the same as the display name of the section as it appears in the Homepage Layout wizard. For reference information about the mapping of section layout names to the corresponding UI names, see <a href="#">Homepage Section Layout Mapping</a>.</p> <ul style="list-style-type: none"> <li>• &lt;Sequence&gt; determines the column in which the section is displayed: <ul style="list-style-type: none"> <li>○ An even number, including 0 (zero), indicates that the section is in the Left Side list, where 0 (zero) is the first section.</li> <li>○ An odd number indicates that the section is in the Right Side list, where a value of 1 is the top (or first) section.</li> </ul> </li> </ul>	<pre>&lt;data:ListOfSelectedSection&gt;   &lt;data:SelectedSection&gt;     &lt;data:SectionName&gt;PdqList   &lt;/data:SectionName&gt;   &lt;data:SectionLayoutName&gt;     HomepageAccountList   &lt;/data:SectionLayoutName&gt;   &lt;data:Sequence&gt;0&lt;/data:Sequence&gt; &lt;/data:SelectedSection&gt; . . . &lt;/data:ListOfSelectedSection&gt;</pre>

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

## About the PdqList Section Name

In the <ListOfSelectedSection> section in *Elements and Sections in the Homepage Layout XML Output File*, the section name, PdqList, is an applet name. The applet name specified in the corresponding object homepage XML file (for example, in AccountHomepage.xml or ContactHomepage.xml) is the same, but the layout name is different.

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

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

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

- Applet Name: PdqList
- Layout Name: HomepageContactList

- Display Name: `contact Lists`

## Example of Sequence Values in the Section: ListOfSelectedSection

The following image represents the left and right side of the Accounts homepage UI. Exporting this homepage layout generates the `<ListOfSelectedSection>` section in the XML code displayed in the following code example. The sequence numbers for the left-side column and right-side column displayed in the following image are contained in the `<Sequence>` elements in the XML code.



## Example of Generated XML Code for the Sequence Values

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

```
<data:ListOfSelectedSection>
  <data:SelectedSection>
    <data:SectionName>AccountRelatedTasks</data:SectionName>
    <data:SectionLayoutName>AllOpenAccountTasks</data:SectionLayoutName>
    <data:Sequence>0</data:Sequence>
  </data:SelectedSection>
  <data:SelectedSection>
    <data:SectionName>AccountRecentlyApplet</data:SectionName>
    <data:SectionLayoutName>All Recently Modified Accounts</data:SectionLayoutName>
    <data:Sequence>1</data:Sequence>
  </data:SelectedSection>
  <data:SelectedSection>
    <data:SectionName>PdqList</data:SectionName>
    <data:SectionLayoutName>HomepageAccountList</data:SectionLayoutName>
    <data:Sequence>2</data:Sequence>
  </data:SelectedSection>
  <data:SelectedSection>
    <data:SectionName>HomePageListAnalyticsRevenue</data:SectionName>
    <data:SectionLayoutName>Account Analysis Report</data:SectionLayoutName>
    <data:Sequence>3</data:Sequence>
  </data:SelectedSection>
  <data:SelectedSection>
    <data:SectionName>AccountRecentlyApplet</data:SectionName>
    <data:SectionLayoutName>All Recently Created Accounts</data:SectionLayoutName>
    <data:Sequence>5</data:Sequence>
  </data:SelectedSection>
</data:ListOfSelectedSection>
```



# Migrating Homepage Layouts

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

- [Extracting All Homepage Layouts](#)
- [Updating or Inserting a Homepage Layout \(Upsert\)](#)

## Extracting All Homepage Layouts

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

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

### Syntax

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

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

where:

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

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

### Example of Extracting All Homepage Layouts

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

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

## Updating or Inserting a Homepage Layout (Upsert)

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

## About the Upsert Operation

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

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

**Note:** The homepage layout cannot reference section names that are not set up on the target system in an Upsert operation.

## Sequence Tags

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

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

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

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

- -1 is not acceptable because only positive integers are acceptable
- 0, 0, 1, 2 is not acceptable because duplicates must not exist
- 2 is not acceptable because the first left side value (that is, 0) is missing
- 3 is not acceptable, because the first right side value (that is, 1) is missing
- 1, 2 is not acceptable because the first left side value (that is, 0) is missing
- 0, 3 is not acceptable because the first right side value (that is, 1) is missing
- 0,1,2,5 is not acceptable, because the second right side value (that is, 3) is missing
- 0, 2, 3 is not acceptable, because the first right side value (that is, 1) is missing

## Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert HomepageLayout HomepageLayoutXML
```

where:

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

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

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

## Example of Updating or Inserting a Homepage Layout

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

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

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



# 15 Migrating Action Bar Layouts

## Migrating Action Bar Layouts

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

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

## Action Bar Layouts

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

The following table describes the Oracle Migration Tool On Demand client commands used with Action bar layouts. For more information about running these commands, see [Migrating Action Bar Layouts](#).

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

## Privileges Required for Migrating Action Bar Layouts

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

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

For information about setting and checking privileges, see [Oracle CRM On Demand Online Help](#).

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

The following table describes the elements and sections in the Action bar layout XML output file.

Description	Element or Section
The <LayoutName> element contains the name of the Action bar layout.	<pre>&lt;data:LayoutName&gt;My Custom Action Bar Layout &lt;/data:LayoutName&gt;</pre>
The <Description> element contains the description of the Action bar layout.	<pre>&lt;data:Description&gt;Custom Action Bar Layout Description &lt;/data:Description&gt;</pre>
The <ListOfSections> section contains the details of the Action bar sections.	<pre>&lt;data:ListOfSections&gt; . . . &lt;/data:ListOfSections&gt;</pre>
<p>The &lt;Section&gt; section contains the details of one section in the Action bar, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;Name&gt; contains the name of the section.</li> <li>• The &lt;Displayed&gt; element is not used. A value might be returned by a read operation, but the element is ignored for upsert operations.</li> <li>• &lt;Sequence&gt; indicates the position of the section in the lists of sections for the Action bar layout, as follows: <ul style="list-style-type: none"> <li>○ Positive integers (for example, 0, 1, 2, 3, and so on) indicate that the section is in the Action Bar Displayed Sections list, and the value indicates the location of the section, with 0 (zero) meaning the section is located at the top of the Action bar.</li> <li>○ A value of -1 indicates that the section is in the Action Bar Available Sections list.</li> <li>○ A value of -2 indicates that the section is in the Not Available Sections list.</li> <li>○ A value of -3 indicates that the section is in the Global Header Available Sections list.</li> </ul> </li> <li>• &lt;GlobalHeaderSection&gt; specifies whether the section is included in the Global Header Available Sections list (true) or is not included in the Global Header Available list (false).</li> </ul>	<pre>&lt;data:ListOfSections&gt; &lt;data:Section&gt; &lt;data:Name&gt;Global Search Multi Field &lt;/data:Name&gt; &lt;data:Displayed&gt;true&lt;/data:Displayed&gt; &lt;data:Sequence&gt;-2&lt;/data:Sequence&gt; &lt;data:GlobalHeaderSection&gt;&gt;false &lt;data:GlobalHeaderSection&gt; &lt;/data:Section&gt; &lt;data:Section&gt; &lt;data:Name&gt;Quick Message Center &lt;/data:Name&gt; &lt;data:Displayed&gt;true&lt;/data:Displayed&gt; &lt;data:Sequence&gt;-2&lt;/data:Sequence&gt; &lt;data:GlobalHeaderSection&gt;&gt;false &lt;/data:GlobalHeaderSection&gt; &lt;/data:Section&gt; &lt;data:Section&gt; &lt;data:Name&gt;Calendar Action Applet &lt;/data:Name&gt; &lt;data:Displayed&gt;&gt;false&lt;/data:Displayed&gt; &lt;data:Sequence&gt;-1&lt;/data:Sequence&gt; &lt;data:GlobalHeaderSection&gt;&gt;false &lt;/data:GlobalHeaderSection&gt; &lt;/data:Section&gt; &lt;data:Section&gt; &lt;data:Name&gt;Quick Favorite Lists&lt;/data:Name&gt; &lt;data:Displayed&gt;true&lt;/data:Displayed&gt; &lt;data:Sequence&gt;3&lt;/data:Sequence&gt; &lt;data:GlobalHeaderSection&gt;&gt;false &lt;/data:GlobalHeaderSection&gt; &lt;/data:Section&gt; &lt;data:Section&gt; &lt;data:Name&gt;Quick History&lt;/data:Name&gt; &lt;data:Displayed&gt;true&lt;/data:Displayed&gt; &lt;data:Sequence&gt;1&lt;/data:Sequence&gt; &lt;data:GlobalHeaderSection&gt;&gt;true</pre>

Description	Element or Section
	<pre> &lt;/data:GlobalHeaderSection&gt; &lt;/data:Section&gt; &lt;data:Section&gt; &lt;data:Name&gt;Quick Favorite Records &lt;/data:Name&gt; &lt;data:Displayed&gt;true&lt;/data:Displayed&gt; &lt;data:Sequence&gt;2&lt;/data:Sequence&gt; &lt;data:GlobalHeaderSection&gt;true &lt;/data:GlobalHeaderSection&gt; &lt;/data:Section&gt; &lt;data:Section&gt; &lt;data:Name&gt;Quick Create&lt;/data:Name&gt; &lt;data:Displayed&gt;true&lt;/data:Displayed&gt; &lt;data:Sequence&gt;0&lt;/data:Sequence&gt; &lt;data:GlobalHeaderSection&gt;&gt;false &lt;/data:GlobalHeaderSection&gt; &lt;/data:Section&gt; &lt;/data:ListOfSections&gt;                     </pre>
<p>The &lt;ListOfGlobalHeaders&gt; section contains the specification for the global header for the Action bar layout.</p>	<pre> &lt;data:ListOfGlobalHeaders&gt; . . . &lt;/data:ListOfGlobalHeaders&gt;                     </pre>
<p>The &lt;GlobalHeader&gt; section contains details of one section in the global header, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;Order&gt; indicates the order in which the section is displayed in the global header (required).</li> <li>• &lt;Icon&gt; contains the name of the icon for the section (required).</li> <li>• &lt;Applet&gt; contains the name of the section (required).</li> <li>• &lt;AppletWidth&gt; specifies the width of the section (required).</li> <li>• &lt;AppletDescription&gt; contains a description of the section.</li> </ul>	<pre> &lt;data:ListOfGlobalHeaders&gt; &lt;data:GlobalHeader&gt; &lt;data:Order&gt;1&lt;/data:Order&gt; &lt;data:Icon&gt;202&lt;/data:Icon&gt; &lt;data:Applet&gt;Global Header Create &lt;/data:Applet&gt; &lt;data:AppletWidth&gt;0&lt;/data:AppletWidth&gt; &lt;data:AppletDescription/&gt; &lt;/data:GlobalHeader&gt; &lt;data:GlobalHeader&gt; &lt;data:Order&gt;3&lt;/data:Order&gt; &lt;data:Icon&gt;205&lt;/data:Icon&gt; &lt;data:Applet&gt;Quick Favorite Records&lt;/data:Applet&gt; &lt;data:AppletWidth&gt;160&lt;/data:AppletWidth&gt; &lt;data:AppletDescription/&gt; &lt;/data:GlobalHeader&gt; &lt;data:GlobalHeader&gt; &lt;data:Order&gt;2&lt;/data:Order&gt; &lt;data:Icon&gt;202&lt;/data:Icon&gt; &lt;data:Applet&gt;Quick History&lt;/data:Applet&gt; &lt;data:AppletWidth&gt;160&lt;/data:AppletWidth&gt; &lt;data:AppletDescription/&gt; &lt;/data:GlobalHeader&gt; &lt;/data:ListOfGlobalHeaders&gt;                     </pre>

## Name Element Value to UI Value Mapping for Applets

The following table maps the <Name> element values in the XML to the values in the Oracle CRM On Demand UI for the preconfigured applets. See the preceding table for more information about the <Name> element.

Name Element Value in XML File	UI Value
Calendar Action Applet	Calendar

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

## Migrating Action Bar Layouts

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

- [Extracting All Action Bar Layouts](#)
- [Updating or Inserting an Action Bar Layout \(Upsert\)](#)

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

## Extracting All Action Bar Layouts

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

### Syntax

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

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

where:

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



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

## Example of Extracting All Action Bar Layouts

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

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

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

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

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

### About the Upsert Operation

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

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

### Syntax

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

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

where:

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

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

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

## Example of Updating or Inserting an Action Bar Layout

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

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

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

# 16 Migrating Related Information Layouts

## Migrating Related Information Layouts

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

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

## Related Information Layouts

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

The following table describes the Oracle Migration Tool On Demand client commands used with related information layouts. For more information about running these commands, see [Migrating Related Information Layouts](#).

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

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

# Privileges Required for Migrating Related Information Layouts

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

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

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

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

The following table describes the elements and sections in the related information layout XML output file.

Description	Element or Section
<IncludeAll> specifies whether the preconfigured related information layouts are returned in addition to the customized layouts (true), or if only the customized layouts are returned. The default setting is false.	<code>&lt;data:IncludeAll&gt;&gt;false&lt;/data:IncludeAll&gt;</code>
<CurrentUserOnly> specifies whether the output must contain only the related information layouts that are associated with the current user's role. If it is set to true, then only the layouts that are associated with the current user's role are included. If it is set to false or null, then the output is not restricted to the layouts that are associated with the current user's role. The default setting is false.	<code>&lt;data:CurrentUserOnly&gt;&gt;false&lt;/data:CurrentUserOnly&gt;</code>
<ObjectName> contains the system name of the parent record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
<RelatedInformationName> contains the child applet ID of the related information section. For information about child applet IDs and their mappings to the names of the related information sections as they	<code>&lt;data:RelatedInformationName&gt;OptyChildList&lt;/data:RelatedInformationName&gt;</code>

Description	Element or Section
appear in the UI, see <i>Child Applet IDs and Their Corresponding Names</i> .	
<Name> contains the name given to the related information layout.	<code>&lt;data:Name&gt;Opportunities&lt;/data:Name&gt;</code>
<Description> contains the description of the layout.	<code>&lt;data:Description&gt;Test Related Opportunities&lt;/data:Description&gt;</code>
<p>For certain record types only, you can specify how the related records are sorted in the related information section when a user opens the parent record detail page, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;SortField&gt; corresponds to the Sort By field in the Page Layout wizard. It displays the name of the field that is used to sort the related records in the related information section when the parent record detail page opens.</li> <li>• &lt;SortDir&gt; specifies the sort order for the records in the related information section. The valid values are Ascending and Descending.</li> </ul> <p>For a list of the related information sections that support the sort feature, and the valid values for the &lt;SortField&gt; element, see <i>Support for the Sort Feature in Related Information Sections</i>.</p>	<pre> &lt;data:RelatedInformationLayout&gt; . . . &lt;data:SortField&gt;Primary Revenue Close DateName&lt;/data:SortField&gt; &lt;data:SortDir&gt;Ascending&lt;/data:SortDir&gt; . . . &lt;data:RelatedInformationLayout&gt; </pre>
<EnableListAdd> is available for certain related information sections only. It determines whether the List Add feature is enabled for the related information section (true) or is not enabled (false). The List Add feature allows users to add multiple records to the related information section at one time. For a list of the related information sections that support the List Add feature, see <i>Oracle CRM On Demand Online Help</i> .	<code>&lt;data:EnableListAdd&gt;&gt;true&lt;/data:EnableListAdd&gt;</code>
The <ListOfSelectedField> section contains a <SelectedField> child section for each field that appears in the Selected Fields list in the related information layout.	<pre> &lt;data:ListOfSelectedField&gt; . . . &lt;/data:ListOfSelectedField&gt; </pre>
<p>The &lt;SelectedField&gt; section contains the details of one field in the Selected Fields list in the related information layout:</p> <ul style="list-style-type: none"> <li>• &lt;FieldName&gt; contains the name of the field.</li> </ul>	<pre> &lt;data:ListOfSelectedField&gt; &lt;data:SelectedField&gt; &lt;data:FieldName&gt;Contact Full Name&lt;/data:FieldName&gt; &lt;data:Sequence&gt;0&lt;/data:Sequence&gt; &lt;/data:SelectedField&gt; . . . &lt;/data:ListOfSelectedField&gt; </pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;Sequence&gt; specifies the sequence of the field in the Selected Fields list. The valid values are the integers 0 through 19.</li> </ul>	

## Support for the Sort Feature in Related Information Sections

The following table shows the parent record type and related information combinations for which you can optionally configure a sort field and sort order. The table also shows the valid values for the <SortField> element for each of the listed related information sections.

Parent Record Type	Related Information	Sort Fields
Account	Assets	<ul style="list-style-type: none"> <li>• Product Name</li> <li>• Serial Number. Corresponds to the Serial # field.</li> <li>• Product Status. Corresponds to the Status field.</li> </ul>
	Completed Activities	Due Date
	Contacts	<ul style="list-style-type: none"> <li>• Last Name.</li> <li>• Primary Contact Flag. Corresponds to the Primary Contact check box.</li> </ul>
	Open Appointments	Planned. Corresponds to the Start Time field.
	Opportunities	<ul style="list-style-type: none"> <li>• Primary Revenue Close Date. Corresponds to the Close Date field.</li> <li>• Created. Corresponds to the Created: Date field.</li> <li>• Name. Corresponds to the Opportunity Name field.</li> <li>• Updated. Corresponds to the Modified: Date field.</li> </ul>
Campaign	Opportunities	<ul style="list-style-type: none"> <li>• Primary Revenue Close Date. Corresponds to the Close Date field.</li> <li>• Created. Corresponds to the Created: Date field.</li> <li>• Name. Corresponds to the Opportunity Name field.</li> </ul>

Parent Record Type	Related Information	Sort Fields
		<ul style="list-style-type: none"> <li>Updated. Corresponds to the Modified: Date field.</li> </ul>
Contact	Accounts	<ul style="list-style-type: none"> <li>Last Name</li> <li>Primary Contact Flag. Corresponds to the Primary Contact check box.</li> </ul>
	Assets	<ul style="list-style-type: none"> <li>Product Name</li> <li>Serial Number. Corresponds to the Serial # field.</li> <li>Product Status. Corresponds to the Status field.</li> </ul>
	Completed Activities	Due Date
	Open Appointments	Planned. Corresponds to the Start Time field.
	Opportunities	<ul style="list-style-type: none"> <li>Primary Revenue Close Date. Corresponds to the Close Date field.</li> <li>Created. Corresponds to the Created: Date field.</li> <li>Name. Corresponds to the Opportunity Name field.</li> <li>Updated. Corresponds to the Modified: Date field.</li> </ul>
	Service Requests	<ul style="list-style-type: none"> <li>Created. Corresponds to the Created: Date field.</li> <li>SR Number. Corresponds to the Service Number field.</li> </ul>
Custom Objects 01 through 03	Assets	<ul style="list-style-type: none"> <li>Product Name</li> <li>Serial Number. Corresponds to the Serial # field.</li> <li>Product Status. Corresponds to the Status field.</li> </ul>
	Opportunities	<ul style="list-style-type: none"> <li>Primary Revenue Close Date. Corresponds to the Close Date field.</li> <li>Created. Corresponds to the Created: Date field.</li> <li>Name. Corresponds to the Opportunity Name field.</li> <li>Updated. Corresponds to the Modified: Date field.</li> </ul>
Custom Objects 04 through 40	Assets	<ul style="list-style-type: none"> <li>Product Name</li> <li>Serial Number. Corresponds to the Serial # field.</li> </ul>

Parent Record Type	Related Information	Sort Fields
		<ul style="list-style-type: none"> <li>Product Status. Corresponds to the Status field.</li> </ul>
Dealer	Contacts	<ul style="list-style-type: none"> <li>Last Name.</li> <li>Primary Contact Flag. Corresponds to the Primary Contact check box.</li> </ul>
	Opportunities	<ul style="list-style-type: none"> <li>Primary Revenue Close Date. Corresponds to the Close Date field.</li> <li>Created. Corresponds to the Created: Date field.</li> <li>Name. Corresponds to the Opportunity Name field.</li> <li>Updated. Corresponds to the Modified: Date field.</li> </ul>
Objective	Opportunities	<ul style="list-style-type: none"> <li>Primary Revenue Close Date. Corresponds to the Close Date field.</li> <li>Created. Corresponds to the Created: Date field.</li> <li>Name. Corresponds to the Opportunity Name field.</li> <li>Updated. Corresponds to the Modified: Date field.</li> </ul>
Opportunity	Assets	<ul style="list-style-type: none"> <li>Product Name</li> <li>Serial Number. Corresponds to the Serial # field.</li> <li>Product Status. Corresponds to the Status field.</li> </ul>
	Completed Activities	Due Date
	Contacts	Last Name
	Open Appointments	Planned. Corresponds to the Start Time field.
	Sub-Opportunities	<ul style="list-style-type: none"> <li>Primary Revenue Close Date. Corresponds to the Close Date field.</li> <li>Created. Corresponds to the Created: Date field.</li> <li>Name. Corresponds to the Opportunity Name field.</li> <li>Updated. Corresponds to the Modified: Date field.</li> </ul>
Partner	Contacts	<ul style="list-style-type: none"> <li>Last Name.</li> </ul>



Parent Record Type	Related Information	Sort Fields
		<ul style="list-style-type: none"> <li>Primary Contact Flag. Corresponds to the Primary Contact check box.</li> </ul>
Partner Program	Opportunities	<ul style="list-style-type: none"> <li>Primary Revenue Close Date. Corresponds to the Close Date field.</li> <li>Created. Corresponds to the Created: Date field.</li> <li>Name. Corresponds to the Opportunity Name field.</li> <li>Updated. Corresponds to the Modified: Date field.</li> </ul>
Service Request	Completed Activities	Due Date
	Open Appointments	Planned. Corresponds to the Start Time field.

## Migrating Related Information Layouts

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

- *Extracting a Set of Related Information Layouts for a Single Object*
- *Extracting All Related Information Layouts for All Objects*
- *Updating or Inserting a Specific Related Information Layout (Upsert)*

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

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

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

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

#### Syntax

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

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

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the name of the object (record type) for which you want to read a set of related information layouts, for example, Account. The system names for the record types are listed in *System Names for Record Types*.

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

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

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

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

## Extracting All Related Information Layouts for All Objects

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

### Syntax

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

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

where:

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

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

The output from the Oracle Migration Tool On Demand client is saved in the following directory:

```
...\repository\RelatedInformationLayout\Object\RelatedInformationObject\LayoutName.xml
```

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

```
...\repository\RelatedInformationLayout\Account\AccountCompetitorChildList\My Custom Layout.xml
```

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

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

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

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

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

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

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

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

The configuration data is updated when the System Layout Name exists in the target company for the specified object and related object. The following table lists the results of an Upsert operation in different situations.

If the XML file definition contains...	If the target company contains...	Then the result is...
Object: Account Related Object: Account Competitors Layout Name: My Custom Layout	Object: Account Related Object: Account Competitors Layout: Standard Related Information Layout	A new My Custom Layout is inserted
Object: Account Related Object: Account Competitors Layout Name: My Custom Layout	Object: Account Related Object: Account Competitors Layouts: <ul style="list-style-type: none"> <li>Standard Related Information Layout</li> <li>My Custom Layout</li> </ul>	My Custom Layout is updated.
Object: Account Related Object: Account Competitors Layout Name: Standard Related Information Layout	Object: Account Related Object: Account Competitors Layouts: <ul style="list-style-type: none"> <li>Standard Related Information Layout</li> <li>My Custom Layout</li> </ul>	An error is generated because Standard Related Information Layout cannot be updated.

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

- The XML file contains a layout name that exceeds the length supported in the UI.
- The XML contains a description that exceeds the length supported in the UI.
- The XML content references fields that do not exist in the target environment.

## Syntax

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

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

where:

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

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

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

## Example of Updating or Inserting a Related Information Layout

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

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

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

# 17 Migrating Access Profiles

## Migrating Access Profiles

This chapter describes how to migrate access profiles using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Access Profiles](#)
- [Privileges Required for Migrating Access Profiles](#)
- [Elements and Sections in the Access Profile XML Output File](#)
- [Migrating Access Profiles](#)

## Access Profiles

An *access profile* is the set of security permissions that determines what data a user can access.

The following table describes the Oracle Migration Tool On Demand client commands that are used with access profiles. The commands are case sensitive. For examples of running these commands, see [Migrating Access Profiles](#).

Command	Description
<code>[-sortspec "AccessObjectName[ sortorder]" ] Read AccessProfile SystemNameOfAccessProfile</code>	<p>This command exports a single access profile from an Oracle CRM On Demand server.</p> <p>The optional <code>sortspec</code> parameter allows you to sort the access objects by access object name.</p> <p>The supported values for <code>sortorder</code> are:</p> <ul style="list-style-type: none"> <li>• <b>ASC</b> for sorting in ascending order.</li> <li>• <b>DESC</b> for sorting in descending order.</li> </ul> <p>If you specify <code>AccessObjectName</code> but you do not specify the sort order, then the access objects are sorted in ascending order by default.</p> <p>If you do not specify <code>AccessObjectName</code>, then the access objects are listed in no specific order.</p>
<code>[-sortspec "AccessObjectName[ sortorder]" ] ReadAll AccessProfile [FolderLocation]</code>	<p>This command exports all access profiles from an Oracle CRM On Demand server.</p> <p>For information about the optional <code>sortspec</code> parameter, see the description of the <code>Read</code> command.</p>
<code>Upsert AccessProfile AccessProfileXML</code>	<p>This command updates or inserts a single access profile on an Oracle CRM On Demand server, as required.</p>

**Note:** Do not assume that the system name of the access profile is the same as what you see in the user interface for Oracle CRM On Demand. For example, if you create an access profile called My Access Profile and later rename it to My Renamed Access Profile, then the system name continues to be My Access Profile. Therefore, if you want to read this specific access profile, then you must reference it by the name, My Access Profile, in your read request. The only way to determine the real name of an access profile that has been modified is to perform a ReadAll operation and export all the configuration data.

## Privileges Required for Migrating Access Profiles

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

- For the `Read` and `ReadAll` commands: Enable Web Services Access, and Manage Roles and Access.
- For the `Upsert` command: Enable Web Services Access, Manage Roles and Access, and the appropriate privilege to manage access to the relevant record type.

For example, if the access profile contains information about Custom Object 02, then the user role must have the Customize Application - Manage Custom Object 02 privilege. For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Access Profile XML Output File

The following table describes the elements and sections in the access profile XML output file.

Description	Element or Section
<p>&lt;Name&gt; contains the system name of the access profile. This is the same name that is used to retrieve a single access profile.</p> <p>This name never changes during any updates. When a new access profile is inserted, this name is used as the display name if a display name is not provided in the &lt;AccessProfileTranslation&gt; element of the XML file.</p>	<p>&lt;data:Name&gt;Administrator&lt;/data:Name&gt;</p>
<p>&lt;NameTranslation&gt; contains the name of the access profile in the language of the user who extracts the access profile information. This element is read-only and is ignored for Upsert requests.</p>	<p>&lt;data:NameTranslation&gt;&lt;/data:NameTranslation&gt;</p>

Description	Element or Section
<AccessProfileID> contains the access profile ID. This element is read-only and is ignored for Upsert requests.	<code>&lt;data:AccessProfileId&gt;&lt;/data:AccessProfileId&gt;</code>
<Description> contains the description of the access profile that is used if one is not provided in the <AccessProfileTranslation> element of the XML file.	<code>&lt;data:Description&gt;&lt;/data:Description&gt;</code>
<AvailableForTeam> specifies whether the access profile can be granted to team members (true) or cannot be granted to team members (false). This element corresponds to the Grantable to Team Members check box in Step 1 of the Access Profile Wizard.	<code>&lt;data:AvailableForTeam&gt;&gt;false&lt;/data:AvailableForTeam&gt;</code>
<AvailableForBook> specifies whether the access profile can be assigned to a user's association with a book (true) or cannot be assigned to a user's association with a book (false). This element corresponds to the Grantable to Book Users check box in Step 1 of the Access Profile Wizard.	<code>&lt;data:AvailableForBook&gt;&gt;false&lt;/data:AvailableForBook&gt;</code>
<Disabled> indicates if the access profile is disabled (true) or is not disabled (false). This element corresponds to the Disabled check box in Step 1 of the Access Profile Wizard.	<code>&lt;data:Disabled&gt;&gt;false&lt;/data:Disabled&gt;</code>
The <ListOfAccessProfileTranslation> section contains the translation values for the access profile.	<code>&lt;data:ListOfAccessProfileTranslation&gt; . . . &lt;/data:ListOfAccessProfileTranslation&gt;</code>
<p>The &lt;AccessProfileTranslation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter code for a language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>• &lt;Title&gt; contains the title for the access profile in the language identified by the language code.</li> <li>• &lt;Description&gt; contains the description for the access profile in the language identified by the language code.</li> </ul> <p>In this example, when the user's language is set to German (DEU), the following values are displayed in the access profile:</p>	<pre> &lt;data:ListOfAccessProfileTranslation&gt;   &lt;data:AccessProfileTranslation&gt;     &lt;data:LanguageCode&gt;DEU&lt;/data:LanguageCode&gt;     &lt;data:Title&gt;Administrator Standardzugriffsprofil   &lt;/data:Title&gt;     &lt;data:Description&gt;Vom System erzeugt   &lt;/data:Description&gt;   &lt;/data:AccessProfileTranslation&gt;   .   .   . &lt;/data:ListOfAccessProfileTranslation&gt; </pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>The title of the access profile is Administrator Standardzugriffsprofil</li> <li>The description is Vom System erzeugt</li> </ul>	
<p>The &lt;ListOfAccessProfileEntry&gt; section describes the access rights defined on the access profile.</p>	<pre>&lt;data:ListOfAccessProfileEntry&gt; . . . &lt;/data:ListOfAccessProfileEntry&gt;</pre>
<p>The &lt;AccessProfileEntry&gt; section describes one access object (that is, a record type or related record type for which a permission can be granted) and the permissions granted for the access object:</p> <ul style="list-style-type: none"> <li>&lt;AccessObjectName&gt; is the name of the access object. For information about the access object names that appear in the &lt;AccessObjectName&gt; elements in the XML, and their associated display names in the user interface, see <a href="#">Access Objects and Corresponding Display Names</a>.</li> <li>&lt;PermissionCode&gt; is the code corresponding to the permission for an access object, for example, R, RU, CRUD and so on. For information about the permissions that are available for the access objects, see <a href="#">Access Levels and Corresponding Permission Codes in the XML File</a>.</li> </ul>	<pre>&lt;data:ListOfAccessProfileEntry&gt; &lt;data:AccessProfileEntry&gt; &lt;data:AccessObjectName&gt;CustomObject10 &lt;/data:AccessObjectName&gt; &lt;data:PermissionCode&gt;R&lt;/data:PermissionCode&gt; &lt;/data:AccessProfileEntry&gt; . . . &lt;/data:ListOfAccessProfileEntry&gt;</pre>

## Migrating Access Profiles

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

- [Extracting a Single Access Profile](#)
- [Extracting a Single Access Profile by System Name Using a Template File](#)
- [Extracting All Access Profiles](#)
- [Extracting All Access Profiles to a Specific Location](#)
- [Updating or Inserting an Access Profile \(Upsert\)](#)

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



## Extracting a Single Access Profile

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

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific access profile:

```
migrationtool -u UserID -s ServerURL Read AccessProfile SystemNameOfAccessProfile
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfAccessProfile* is the system name of the access profile that you want to extract, for example, Administrator Default Access Profile.

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

### Examples of Extracting a Single Access Profile

The following is an example of extracting a specific access profile: Administrator Default Access Profile:

```
migrationtool -u UserID -s ServerURL Read AccessProfile "Administrator Default Access Profile"
```

**Note:** Quotation marks are required only if the access profile name contains spaces.

The following is an example of extracting a specific access profile with the access objects sorted by access object name in ascending order:

```
migrationtool -u UserID -s ServerURL -sortspec "AccessObjectName ASC" Read AccessProfile "Administrator Default Access Profile"
```

## Extracting a Single Access Profile by System Name Using a Template File

This topic describes how to extract a single access profile from your Oracle CRM On Demand server for your environment (customer test environment or production) by system name, using a template file.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific access profile by system name, using an access profile input file that is derived from the access profile template file:

```
migrationtool -u UserID -s ServerURL Read AccessProfile AccessProfileTemplateXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *AccessProfileTemplateXML* is an XML file that is derived from the default access profile template file on your computer. The location of the default access profile template (*AccessProfile.xml*) depends on the operating system of your computer. If your computer uses a Windows operating system, then the template file is stored in the following directory:

```
Installation_Directory\windows\resources\template
```

If your computer uses any operating system other than a Windows operating system, then the template file is stored in the following directory:

```
Installation_Directory/other/MigrationTool/resources/template
```

In the directory path, *Installation\_Directory* is the directory where the Oracle Migration Tool On Demand client is installed.

**Note:** Do not modify the default template file. If the template file is modified, then a Read operation extracts only the access profile specified in the template file, bypassing what is provided on the command line. Instead, modify a copy of the default access profile.

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

## Example of Extracting a Single Access Profile by System Name Using a Template File

The following is an example of extracting a specific access profile by system name using a template file. In this example, before you run the Oracle Migration Tool On Demand client, make a copy of the default file, *AccessProfile.xml*, and in the copy, add the system name of the access profile between the tags:

```
<data:Name> </data:Name>
```

For example: `<data:Name>Administrator Default Access Profile</data:Name>`

```
migrationtool -u UserID -s ServerURL Read AccessProfile "C:\Oracle Migration Tool On Demand\windows  
\resources\template\MyAccessProfile.xml"
```

Quotation marks are required only if the name contains spaces. If quotation marks are not surrounding the name, then the Oracle Migration Tool On Demand client uses the first value and bypasses the remaining values. For example, if you have two access profiles called *Admin* and *Admin Access Profile*, and you send the following request (without quotation marks), then the Oracle Migration Tool On Demand client extracts the *Admin* access profile, because no quotation marks are used. Oracle Migration Tool On Demand client uses the first value (*Admin*) and bypasses the rest (*Access Profile*):

```
migrationtool -u UserID -s ServerURL Read AccessProfile Admin Access Profile
```

## Extracting All Access Profiles

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

### Syntax

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

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

where:

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

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

### Examples of Extracting All Access Profiles

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

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

The following is an example of extracting all access profiles with the access objects in each access profile sorted by access object name in descending order:

```
migrationtool -u UserID -s ServerURL -sortspec "AccessObjectName DESC" ReadAll AccessProfile
```

## Extracting All Access Profiles to a Specific Location

This topic describes how to extract all access profiles from your Oracle CRM On Demand environment (customer test environment or production) to a specific location.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all access profiles to a specific location:

```
migrationtool -u UserID -s ServerURL ReadAll AccessProfile FolderLocation
```

where:

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

- *FolderLocation* is the directory path to the folder where the extracted access profiles are stored, for example:

```
C:\MyAccessProfiles
```

**Note:** If you do not specify the drive letter, then the folder is created at the root of the directory where the Oracle Migration Tool On Demand client is installed.

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

## Example of Extracting All Access Profiles to a Specific Location

The following is an example of extracting all access profiles from your Oracle CRM On Demand server to a specific folder:

```
migrationtool -u UserID -s ServerURL ReadAll AccessProfile "C:\MyAccessProfiles"
```

## Updating or Inserting an Access Profile (Upsert)

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

### About the Upsert Operation

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

### Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert AccessProfile AccessProfileXML
```

where:

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

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

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

## Example of Updating or Inserting an Access Profile

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

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

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



# 18 Migrating Page Layouts

## Migrating Page Layouts

This chapter describes how to migrate page layouts using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Page Layouts](#)
- [Privileges Required for Migrating Page Layouts](#)
- [Elements and Sections in the Page Layout Field Information XML Output File](#)
- [Elements and Sections in the Page Layout Related Information XML Output File](#)
- [Elements and Sections in the Page Layout Section XML Output File](#)
- [Migrating Page Layout Field Information](#)
- [Migrating Page Layout Related Information](#)
- [Migrating Page Layout Section Information](#)

## Page Layouts

A *page layout* defines the appearance of pages, such as the edit, detail, or create pages for Oracle CRM On Demand records by hiding or adding sections or fields to the page. Page layouts can be one of the following:

- **Static.** Indicates that specific fields are defined by role. This chapter applies only to static page layouts.
- **Dynamic.** Indicates that the page layouts show different sets of fields for different records of the same record type, depending on the picklist value that you select in a certain field on the record.  
For more information about dynamic layouts, see [Migrating Dynamic Page Layouts](#).

The following table describes the Oracle Migration Tool On Demand client commands used with page layouts. For more information about running these commands, see [Migrating Page Layout Field Information](#).

Command	Description
<code>ReadAll PageLayoutField</code>	This command exports all field setup and field layout information for page layouts, as defined in Step 2 and Step 3 of the Oracle CRM On Demand Page Layout Wizard.
<code>ReadAll PageLayoutRelatedInformation</code>	This command exports all related information for page layouts, as defined in Step 4 and Step 5 of the Page Layout Wizard.
<code>ReadAll PageLayoutSection</code>	This command exports all section setup and layout information for page layouts.
<code>Upsert PageLayoutField PageLayoutFieldXML</code>	This command updates or inserts field setup and field layout information for page layouts. The page layout is derived from an XML file definition.

Command	Description
<code>Upsert PageLayoutRelatedInformation PageLayoutRelatedXML</code>	This command updates or inserts page layout related information. The page layout is derived from an XML file definition.
<code>Upsert PageLayoutSection PageLayoutSectionXML</code>	This command updates or inserts page layout section information. The page layout is derived from an XML file definition.

**Note:** Nonadministrative Oracle CRM On Demand users can run the `ReadAll` command for `PageLayoutField`, `PageLayoutRelatedInformation`, and `PageLayoutSection`.

## Privileges Required for Migrating Page Layouts

The following privileges are required for the user account running the command-line interface of the Oracle Migration Tool On Demand client commands:

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

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

## Elements and Sections in the Page Layout Field Information XML Output File

The following table describes the elements and sections in the page layout field information XML output file.

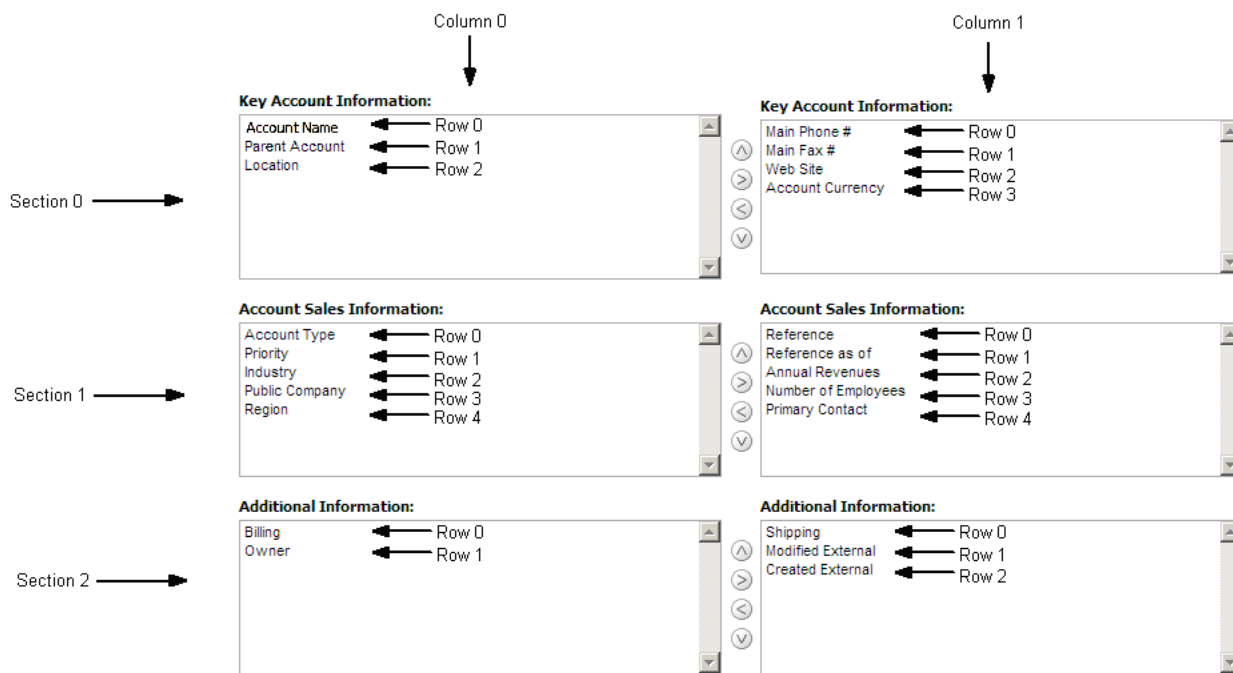
Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
<LayoutName> contains the name of the page layout.	<code>&lt;data:LayoutName&gt;My Custom Account Page Layout&lt;/data:LayoutName&gt;</code>
<Description> contains the description of the page layout.	<code>&lt;data:Description&gt;My Custom Account Page Layout Description&lt;/data:Description&gt;</code>
The <ListOfPageLayoutField> section contains the field layout information. For more information, see <i>Example of the Values for Page Layout Field Information</i> .	<code>&lt;data:ListOfPageLayoutField&gt; &lt;data:PageLayoutField&gt; &lt;data:FieldName&gt;Name&lt;/data:FieldName&gt; &lt;data:ReadOnly&gt;&gt;false&lt;/data:ReadOnly&gt;</code>



Description	Element or Section
	<pre> &lt;data:Required&gt;&gt;true&lt;/data:Required&gt; &lt;data:Section&gt;0&lt;/data:Section&gt; &lt;data:Column&gt;0&lt;/data:Column&gt; &lt;data:Row&gt;0&lt;/data:Row&gt; &lt;/data:PageLayoutField&gt; . . . &lt;/data:ListOfPageLayoutField&gt;                     </pre>

## Example of the Values for Page Layout Field Information

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



The UI Name might not match the value contained in the <FieldName> element. Use the section, column, and row values provided in the XML file to appropriately determine the value that it represents in the UI. For example, consider the following portion of the XML output, which is based on the configuration in the preceding image:

```

<data:PageLayoutField>
  <data:FieldName>Type</data:FieldName>
  <data:ReadOnly>>false</data:ReadOnly>
  <data:Required>>false</data:Required>
  <data:Section>1</data:Section>
  <data:Column>0</data:Column>
  <data:Row>0</data:Row>
</data:PageLayoutField>
    
```

Using the preceding image and the values for the <Section>, <Column>, and <Row> elements in the XML code, you can observe that <FieldName>Type</FieldName> corresponds to the UI value of Account Type in the Account Sales Information section.

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

The following table describes the elements and sections in the page layout related information XML output file.

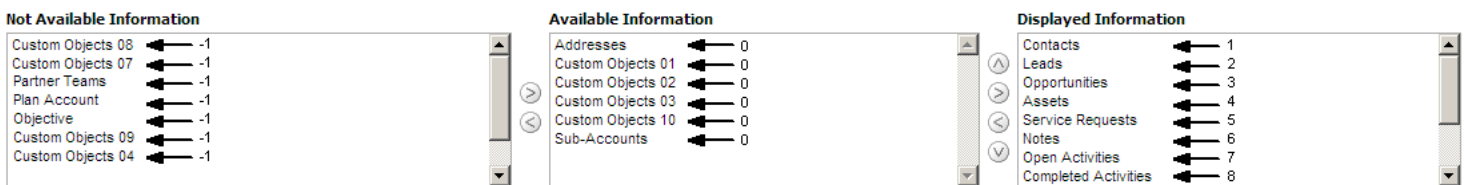
Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
<LayoutName> contains the name of the page layout.	<code>&lt;data:LayoutName&gt;My Custom Account Page Layout&lt;/data:LayoutName&gt;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

Description	Element or Section
	<code>&lt;/data:ListOfPageRelatedInformation&gt;</code>
<code>&lt;NewRecordLayout&gt;</code> contains the name of the layout for creating records from a list of related records.	<pre>                     &lt;data:ListOfPageRelatedInformation&gt;                     &lt;data:PageRelatedInformation&gt;                     . . . .                     &lt;data:NewRecordLayout&gt;                     &lt;/data:NewRecordLayout&gt;                     &lt;/data:PageRelatedInformation&gt;                     &lt;/data:ListOfPageRelatedInformation&gt;                 </pre>

## Example of the Values for Page Layout Related Information

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

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



## About the Displayed Information List

The order of the sections in the XML file for the Displayed Information list (that is, the sections for which the `<Availability>` value is set to 1) determines the order in which the related information sections are displayed in the UI. This order applies to both the `ReadAll` and `Upsert` commands. The following image displays how the order is implemented. In the image, in Example 1, the sections have the following order: Contacts, Leads, and then Opportunities. In Example 2, the sections have the following order: Opportunities, Contacts, and then Leads.

### Example 1

```
<ns1:PageRelatedInformation>
  <ns1:Name>ContactPersonChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>LeadChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>OptyChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
```



**Displayed Information**

Contacts  
 Leads  
 Opportunities

### Example 2

```
<ns1:PageRelatedInformation>
  <ns1:Name>OptyChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>ContactPersonChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
<ns1:PageRelatedInformation>
  <ns1:Name>LeadChildList</ns1:Name>
  <ns1:Availability>1</ns1:Availability>
  <ns1:RelatedInformationLayout></ns1:RelatedInformationLayout>
</ns1:PageRelatedInformation>
```



**Displayed Information**

Opportunities  
 Contacts  
 Leads

## Elements and Sections in the Page Layout Section XML Output File

The following table describes the elements and sections in the page layout section XML output file.

Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
<LayoutName> contains the name of the page layout.	<code>&lt;data:LayoutName&gt;myPageAccountLayout&lt;/data:LayoutName&gt;</code>
The <ListOfPageFormSection> section contains the details of the sections for the page layout.	<code>&lt;data:ListOfPageFormSection&gt;</code> <code>&lt;data:PageFormSection&gt;</code> <code>&lt;data:SectionSequence&gt;3</code> <code>&lt;/data:SectionSequence&gt;</code> . . .

Description	Element or Section
	<pre> &lt;/data:PageFormSection&gt; . . . &lt;/data:ListOfPageFormSection&gt;                     </pre>
<p>The &lt;PageFormSection&gt; section contains the details of one section in the page layout.</p>	<pre> &lt;data:ListOfPageFormSection&gt;   &lt;data:PageFormSection&gt;     . . .     &lt;/data:PageFormSection&gt;   . . . &lt;/data:ListOfPageFormSection&gt;                     </pre>
<p>For information about the &lt;SectionSequence&gt; element, see <i>Example of the Values for Page Layout Sections</i>.</p>	<pre> &lt;data:ListOfPageFormSection&gt;   &lt;data:PageFormSection&gt;     &lt;data:SectionSequence&gt;3   &lt;/data:SectionSequence&gt;   . . .   &lt;/data:PageFormSection&gt;   . . . &lt;/data:ListOfPageFormSection&gt;                     </pre>
<p>The &lt;ListofFormSectionTranslation&gt; section contains the translation values for the section name.</p>	<pre> &lt;data:ListOfPageFormSection&gt;   &lt;data:PageFormSection&gt;     . . .     &lt;data:ListofFormSectionTranslation&gt;     . . .     &lt;/data:ListofFormSectionTranslation&gt;   &lt;/data:PageFormSection&gt;   . . . &lt;/data:ListOfPageFormSection&gt;                     </pre>
<p>The &lt;FormSectionTranslation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LangId&gt; contains the three-letter code for a language. For the list of language codes, see <i>Language Codes and Their Corresponding Language and Country</i>.</li> <li>• &lt;DisplayName&gt; contains the name for the section in the language identified by the language code.</li> </ul>	<pre> &lt;data:ListOfPageFormSection&gt;   &lt;data:PageFormSection&gt;     . . .     &lt;data:ListofFormSectionTranslation&gt;       &lt;data:FormSectionTranslation&gt;         &lt;data:LangId&gt;ENU&lt;/data:LangId&gt;         &lt;data:DisplayName&gt;myPageAccountLayout       &lt;/data:FormSectionTranslation&gt;     . . .     &lt;/data:ListofFormSectionTranslation&gt;   &lt;/data:PageFormSection&gt;   . . . &lt;/data:ListOfPageFormSection&gt;                     </pre>

## Example of the Values for Page Layout Sections

In a page layout section XML file, the <SectionSequence> element specifies the location of a section relative to the other sections in the layout. The first section at the top of the page layout has a <SectionSequence> of 0 which increments by 1 as the sequence moves down the sections in the page layout.


For example, consider the following portion of a page layout section XML file, which shows the values for the *Additional Information*: section:

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

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

**Section Names Setup** | [Back to Account Page Layout](#) [Help](#) | [Printer Friendly](#)

**Edit Section Names**   **Translation Language:** English-American ▼

 Click the Mark for Translation checkbox in order to track Display Names that need to be translated into other languages. Use this option when changing section headers and the changes require translation into another language. Click the help link to learn more.

Display Name	Default Name	Mark for Translation
Key Account Information:	Key Account Information:	<input type="checkbox"/>
Account Sales Information:	Account Sales Information:	<input type="checkbox"/>
Additional Information:	Additional Information:	<input type="checkbox"/>
Account Partner Information:	Available Section:	<input type="checkbox"/>
Account Revenue Information:	Available Section:	<input type="checkbox"/>
Account Social Media Information:	Available Section:	<input type="checkbox"/>

## Migrating Page Layout Field Information

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

- [Extracting All Page Layout Field Information](#)
- [Updating or Inserting Page Layout Field Information for a Single Object \(Upsert\)](#)

When using the Oracle Migration Tool On Demand client to migrate page layout field information, observe that field management information takes precedence over page layout field information when a field is set as required or read-only through field management. For example, if the field management XML for an extract operation specifies a field as required, but the page layout XML for an extract operation specifies the field as not required, then the field is displayed as required in the page layout in the Oracle CRM On Demand UI after migrating this information. To completely extract and migrate a company's field management information, you must extract and migrate both the field management and page layout information. For more information about extracting and migrating field management information, see [Migrating Custom Fields](#).

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

## Extracting All Page Layout Field Information

This topic describes how to extract all page layout field information from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all page layout field information:

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

where:

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

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

### Example of Extracting All Page Layout Field Information

The following is an example of extracting all page layout field information from your Oracle CRM On Demand server:

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

## Updating or Inserting Page Layout Field Information for a Single Object (Upsert)

This topic describes how to update page layout field information for a single object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert PageLayoutField PageLayoutFieldXML
```

where:

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

```
C:\My Files\PageLayoutFieldInformation\Account.xml
```

## Example of Updating or Inserting Page Layout Field Information for a Single Object

The following is an example of updating page layout field information for a single object such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert PageLayoutField "C:\My Files\PageLayoutFieldInformation\nAccount.xml"
```

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

## Migrating Page Layout Related Information

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

- [Extracting All Page Layout Related Information](#)
- [Updating or Inserting Page Layout Related Information for a Single Object \(Upsert\)](#)

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

## Extracting All Page Layout Related Information

This topic describes how to extract all page layout related information from your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

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

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

where:

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

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



## Example of Extracting All Page Layout Related Information

The following is an example of extracting all page layout related information from your Oracle CRM On Demand server:

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

## Updating or Inserting Page Layout Related Information for a Single Object (Upsert)

This topic describes how to update page layout related information for a single object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

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

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

where:

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

```
C:\My Files\PageLayoutRelatedInformation\Account.xml
```

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

## Example of Updating or Inserting Page Layout Related Information for a Single Object

The following is an example of updating the page layout related information for a single object, such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

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

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

## Migrating Page Layout Section Information

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate page layout section information:

- [Extracting All Page Layout Section Information](#)
- [Updating or Inserting Page Layout Section Information for a Single Object \(Upsert\)](#)

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

### Extracting All Page Layout Section Information

This topic describes how to extract all page layout section information from your Oracle CRM On Demand environment (customer test environment or production).

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all page layout section information:

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

where:

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

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

### Example of Extracting All Page Layout Section Information

The following is an example of extracting all page layout section information from your Oracle CRM On Demand server:

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

### Updating or Inserting Page Layout Section Information for a Single Object (Upsert)

This topic describes how to update page layout section information for a single object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

## Syntax

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

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

where:

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

```
C:\My Files\PageLayoutSection\Account\AccountPageLayoutSection.xml
```

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

## Example of Updating or Inserting Page Layout Section Information for a Single Object

The following is an example of updating the page layout section information for a single object, such as Account (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert PageLayoutSection "C:\My Files\PageLayoutSection\Account\nAccountPageLayoutSection.xml"
```

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



# 19 Migrating Dynamic Page Layouts

## Migrating Dynamic Page Layouts

This chapter describes how to migrate dynamic page layouts using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Dynamic Page Layouts](#)
- [Privileges Required for Migrating Dynamic Page Layouts](#)
- [Elements and Sections in the Dynamic Page Layout XML Output File](#)
- [Migrating Dynamic Page Layouts](#)

## Dynamic Page Layouts

*Dynamic page layouts* are page layouts that show different sets of fields for different records of the same record type, depending on the picklist value that you select in a certain field on the record.

The following table describes the Oracle Migration Tool On Demand client commands used with dynamic page layouts. For more information about running these commands, see [Migrating Dynamic Page Layouts](#).

Command	Description
<pre>[-sortspec "[Name [sortorder]] [, Value [sortorder]]" Read DynamicLayout SystemNameOfObject</pre>	<p>This command extracts the configuration data for the dynamic page layouts for a specific record type (object).</p> <p><i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <a href="#">System Names for Record Types</a>.</p> <p>The optional <b>sortspec</b> parameter allows you to sort the dynamic layouts by dynamic layout name, and to sort the picklist values within a dynamic layout by picklist value name.</p> <p><b>Name</b> is the sort field for the dynamic layouts.</p> <p><b>Value</b> is the sort field for the picklist values within a dynamic layout.</p> <p>If you do not specify <b>Name</b>, then the dynamic layouts are listed in no specific order. If you do not specify <b>Value</b>, then the picklist values for each dynamic layout are listed in no specific order.</p> <p>The valid values for <i>sortorder</i> are:</p> <ul style="list-style-type: none"> <li>• <b>ASC</b> for sorting in ascending order.</li> <li>• <b>DESC</b> for sorting in descending order.</li> </ul> <p>If you specify <b>Name</b> but you do not specify the sort order for the names, then the sort order is ascending by default. Similarly, if you specify <b>Value</b> but you do not specify the sort order for the values, then the sort order is ascending by default.</p>

Command	Description
<code>[-sortspec "[Name [sortorder]] [, Value [sortorder]]"] ReadAll DynamicLayout</code>	This command extracts the configuration data for the dynamic page layouts for all objects. For information about the optional <code>sortspec</code> parameter, see the description of the <code>Read</code> command.
<code>Upsert DynamicLayout DynamicLayoutXML</code>	This command updates or inserts a dynamic page layout, as required.

## Privileges Required for Migrating Dynamic Page Layouts

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

- For the `Read` and `ReadAll` command: Enable Web Services Access.
- For the `Upsert` command: Enable Web Services Access and Customize Application - Manage Dynamic Layout.

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

## Elements and Sections in the Dynamic Page Layout XML Output File

The following table describes the elements and sections in the dynamic page layout XML output file.

Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Opportunity&lt;/data:ObjectName&gt;</code>
<DrivingPicklist> contains the name of the dynamic page layout driving picklist. For more information about driving picklists, see <i>Oracle CRM On Demand Online Help</i> .	<code>&lt;data:DrivingPicklist&gt;Sales Type&lt;/data:DrivingPicklist&gt;</code>
The <ListOfDynamicLayouts> section contains the details of the dynamic page layouts for the object.	<code>&lt;data:ListOfDynamicLayouts&gt;</code> . . . <code>&lt;/data:ListOfDynamicLayouts&gt;</code>
The <DynamicLayout> section contains the details of one dynamic page layout.	<code>&lt;data:ListOfDynamicLayouts&gt;</code> <code>&lt;data:DynamicLayout&gt;</code> . . .

Description	Element or Section
	<pre> &lt;/data:DynamicLayout&gt; . . . &lt;/data:ListOfDynamicLayouts&gt;                     </pre>
<p>&lt;Name&gt; contains the name of the dynamic page layout.</p>	<pre> &lt;data:ListOfDynamicLayouts&gt;   &lt;data:DynamicLayout&gt;     &lt;data:Name&gt;dynamic&lt;/data:Name&gt;     . . .   &lt;/data:DynamicLayout&gt;   . . . &lt;/data:ListOfDynamicLayouts&gt;                     </pre>
<p>&lt;DefaultLayout&gt; contains the name of the default page layout with which the driving picklist values are associated.</p>	<pre> &lt;data:ListOfDynamicLayouts&gt;   &lt;data:DynamicLayout&gt;     . . .     &lt;data:DefaultLayout&gt;Opportunity Page     Standard Layout&lt;/data:DefaultLayout&gt;     . . .   &lt;/data:DynamicLayout&gt;   . . . &lt;/data:ListOfDynamicLayouts&gt;                     </pre>
<p>&lt;ModifiedBy&gt; contains the name of the user who last updated the dynamic page layout.</p>	<pre> &lt;data:ListOfDynamicLayouts&gt;   &lt;data:DynamicLayout&gt;     . . .     &lt;data:ModifiedBy&gt;sales10&lt;/data:ModifiedBy&gt;     . . .   &lt;/data:DynamicLayout&gt;   . . . &lt;/data:ListOfDynamicLayouts&gt;                     </pre>
<p>&lt;Description&gt; contains the description of the dynamic page layout.</p>	<pre> &lt;data:ListOfDynamicLayouts&gt;   &lt;data:DynamicLayout&gt;     . . .     &lt;data:Description&gt;Dynamic Layout Description     &lt;/data:Description&gt;     . . .   &lt;/data:DynamicLayout&gt;   . . . &lt;/data:ListOfDynamicLayouts&gt;                     </pre>
<p>The &lt;ListofPicklistValueMapping&gt; section contains the mappings of the driving picklist values to the page layouts:</p> <ul style="list-style-type: none"> <li>• &lt;Value&gt; contains the driving picklist value.</li> <li>• &lt;AssignedLayout&gt; contains the name of the page layout that is displayed when the driving picklist value is selected.</li> </ul>	<pre> &lt;data:ListOfDynamicLayouts&gt;   &lt;data:DynamicLayout&gt;     . . .     &lt;data:ListofPicklistValueMapping&gt;       &lt;data:DrivingPicklist&gt;         &lt;data:Value&gt;New Business&lt;/data:Value&gt;         &lt;data:AssignedLayout&gt;test2&lt;/data:AssignedLayout&gt;       &lt;/data:DrivingPicklist&gt;     &lt;/data:ListofPicklistValueMapping&gt;     . . .   &lt;/data:DynamicLayout&gt;   . . . &lt;/data:ListOfDynamicLayouts&gt;                     </pre>

# Migrating Dynamic Page Layouts

The following topics provide examples of how to use the Oracle Migration Tool On Demand client to migrate dynamic page layout field information:

- [Extracting Dynamic Page Layouts for a Single Object](#)
- [Extracting Dynamic Page Layouts for All Objects](#)
- [Updating or Inserting Dynamic Page Layouts \(Upsert\)](#)

## Extracting Dynamic Page Layouts for a Single Object

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

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

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the dynamic page layouts for a single object:

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

where:

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

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

## Examples of Extracting Dynamic Page Layouts for a Single Object

The following is an example of extracting the dynamic page layouts for the Opportunity record type:

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

In the following example, the dynamic layouts for the Account record are extracted, with the output sorted as follows:

- The dynamic layouts are sorted by dynamic layout name in ascending order.
- The picklist values within each dynamic layout are sorted by picklist value name in descending order.



```
migrationtool -u UserID -s ServerURL -sortspec "Name ASC,Value DESC" Read DynamicLayout Account
```

## Extracting Dynamic Page Layouts for All Objects

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

### Syntax

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

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

where:

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

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

### Examples of Extracting Dynamic Page Layouts for All Objects

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

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

In the following example, the output of the ReadAll command is sorted as follows:

- The dynamic layouts for each record type are sorted by dynamic layout name in ascending order.
- The picklist values within each dynamic layout are sorted by picklist value name in descending order.

```
migrationtool -u UserID -s ServerURL -sortspec "Name ASC, Value DESC" ReadAll DynamicLayout
```

## Updating or Inserting Dynamic Page Layouts (Upsert)

This topic describes how to update dynamic page layout information for a single object (if it exists) or insert this information (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

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

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

where:

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

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

## Example of Updating or Inserting a Dynamic Page Layout

The following is an example of updating a dynamic page layout (if it exists) or inserting this information (if it does not exist) in your Oracle CRM On Demand server:

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

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

# 20 Migrating Search Layouts

## Migrating Search Layouts

This chapter describes how to migrate custom search layouts using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Search Layouts](#)
- [Privileges Required for Migrating Search Layouts](#)
- [Elements and Sections in the Search Layout XML Output File](#)
- [Migrating Search Layouts](#)

## Search Layouts

A *search layout* for a record type determines which fields users can search on when searching for records of that type, and also which fields are displayed in the search results page. Search layouts also determine some of the features in Lookup windows and whether smart associations are enabled. A default search layout is provided for each record type. For many record types, you can create multiple custom search layouts and assign them to user roles. For more information about search layouts, see *Oracle CRM On Demand Online Help* .

The following table describes the Oracle Migration Tool On Demand client commands used with search layouts. These commands are case sensitive.

Command	Description
<code>Read SearchLayout</code> <i>SystemNameOfObject</i> [ <i>SearchLayoutName</i> ]	This command extracts all of the custom search layouts for a specific record type (object), or a single custom layout (if the <i>SearchLayoutName</i> parameter is specified). The parameters are as follows: <ul style="list-style-type: none"> <li>• <i>SystemNameOfObject</i> is the system name of a record type. The system names for the record types are listed in <i>System Names for Record Types</i>.</li> <li>• <i>SearchLayoutName</i> is the name of a search layout. This parameter is optional.</li> </ul>
<code>ReadAll SearchLayout</code>	This command extracts all of the custom search layouts for all objects.
<code>Upsert SearchLayout</code> <i>SearchLayoutXML</i>	This command updates or inserts a custom search layout.

## Privileges Required for Migrating Search Layouts

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

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

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

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

The following table describes the elements and sections in the search layout XML output file.

Description	Element or Section
The <code>&lt;SearchLayout&gt;</code> section contains all of the information for a single search layout.	<code>&lt;data:SearchLayout&gt;</code> . . . <code>&lt;/data:SearchLayout&gt;</code>
<code>&lt;ObjectName&gt;</code> contains the system name of the record type (object), which never changes.	<code>&lt;data:SearchLayout&gt;</code> <code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code> . . . <code>&lt;/data:SearchLayout&gt;</code>
<code>&lt;LayoutName&gt;</code> contains the name of the layout.	<code>&lt;data:SearchLayout&gt;</code> . . . <code>&lt;data:LayoutName&gt;TestLayout&lt;/data:LayoutName&gt;</code> . . . <code>&lt;/data:SearchLayout&gt;</code>
<code>&lt;LastUpdatedBy&gt;</code> contains the date and time the layout was last updated.	<code>&lt;data:SearchLayout&gt;</code> . . . <code>&lt;data&gt;LastUpdatedBy&gt;10/17/2012 12:41:05</code> <code>&lt;/data&gt;LastUpdatedBy&gt;</code> . . . <code>&lt;/data:SearchLayout&gt;</code>
<code>&lt;Description&gt;</code> contains the description for the layout.	<code>&lt;data:SearchLayout&gt;</code> . . . <code>&lt;data:Description&gt;This is a test layout.</code> <code>&lt;/data:Description&gt;</code> . . .

Description	Element or Section
	<pre>&lt;/data:SearchLayout&gt;</pre>
<p>The &lt;ListOfSpecifySearchFields&gt; section contains the details of the search fields for the layout.</p>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:ListOfSpecifySearchFields&gt; . . . &lt;/data:ListOfSpecifySearchFields&gt; . . . &lt;/data:SearchLayout&gt;</pre>
<p>The &lt;SearchLayoutField&gt; section includes the following elements for a single search field:</p> <ul style="list-style-type: none"> <li>• &lt;FieldName&gt; contains the system name of the field, which never changes.</li> <li>• &lt;SearchOptimization&gt; indicates whether the field is optimized for fast search and whether it can be case insensitive in a search. For more information about this element, see the <i>About the SearchOptimization Element</i> section of this topic.</li> <li>• &lt;Section&gt; indicates which section of the search field layout the field appears in, as follows: <ul style="list-style-type: none"> <li>○ A value of 0 indicates that the field is in the Not Available Search Fields section.</li> <li>○ A value of 1 indicates that the field is in the Targeted Search Fields section.</li> <li>○ A value of 2 indicates that the field is in the Additional Search Fields section.</li> </ul> </li> <li>• The &lt;Order&gt; element indicates the position of the field within the section of the search layout. In the Targeted Search Fields section and the Additional Search Fields section, the fields are numbered consecutively within the section. The first field in each section is numbered 0, the second field is numbered 1, and so on. All of the fields in the Not Available Search Fields section have their order number set to -1.</li> </ul>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:ListOfSpecifySearchFields&gt; &lt;data:SearchLayoutField&gt; &lt;data:FieldName&gt;Name_Shadow &lt;/data:FieldName&gt; &lt;data:SearchOptimization&gt;2 &lt;/data:SearchOptimization&gt; &lt;data:Section&gt;1&lt;/data:Section&gt; &lt;data:Order&gt;0&lt;/data:Order&gt; &lt;/data:SearchLayoutField&gt; . . . &lt;/data:ListOfSpecifySearchFields&gt; . . . &lt;/data:SearchLayout&gt;</pre>
<p>The &lt;ListOfDefineSearchResultsLayout&gt; section contains the details of the search result fields for the layout.</p>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:ListOfDefineSearchResultsLayout&gt; . . . &lt;data:ListOfDefineSearchResultsLayout&gt; . . . &lt;/data:SearchLayout&gt;</pre>

Description	Element or Section
<p>The &lt;SearchLayoutField&gt; section includes the following elements for a single search result field:</p> <ul style="list-style-type: none"> <li>• &lt;FieldName&gt; is the name of the field.</li> <li>• &lt;SearchOptimization&gt; indicates whether the field is optimized for fast search and whether it can be case insensitive in a search. For more information about this element, see the <i>About the SearchOptimization Element</i> section of this topic.</li> <li>• &lt;Section&gt; indicates which section of the search results layout the field appears in, as follows: <ul style="list-style-type: none"> <li>○ A value of 0 indicates that the field is in the Not Available Search Results Fields section.</li> <li>○ A value of 1 indicates that the field is in the Lookup Window Search Results Fields section.</li> <li>○ A value of 2 indicates that the field is in the Additional Search Results Fields section.</li> </ul> </li> <li>• &lt;Order&gt; indicates the position of the field within the list of fields. In the Lookup Window Search Results Fields section and the Additional Search Results Fields section, the fields are numbered consecutively within the section. The first field in each section is numbered 0, the second field is numbered 1, and so on. All of the fields in the Not Available Search Results Fields section have their order number set to -1.</li> </ul>	<pre> &lt;data:SearchLayout&gt; . . . &lt;data:ListOfDefineSearchResultsLayout&gt; &lt;data:SearchLayoutField&gt; &lt;data:FieldName&gt;Name_Shadow &lt;/data:FieldName&gt; &lt;data:SearchOptimization&gt;2 &lt;/data:SearchOptimization&gt; &lt;data:Section&gt;1&lt;/data:Section&gt; &lt;data:Order&gt;0&lt;/data:Order&gt; &lt;/data:SearchLayoutField&gt; &lt;/data:ListOfDefineSearchResultsLayout&gt; . . . &lt;/data:SearchLayout&gt; </pre>
<p>The &lt;ListOfDefaultSearchValues&gt; section contains all of the default values for the fields in the list of targeted search fields, corresponding to Step 3 in the Search Layout wizard in the UI.</p>	<pre> &lt;data:SearchLayout&gt; . . . &lt;data:ListOfDefaultSearchValues&gt; . . . &lt;data:ListOfDefaultSearchValues&gt; . . . &lt;/data:SearchLayout&gt; </pre>
<p>The &lt;DefaultSearchField&gt; section includes the following elements for a single search field:</p> <ul style="list-style-type: none"> <li>• &lt;FieldName&gt; is the name of the field.</li> <li>• &lt;DefaultSearchCondition&gt; is the filter condition. The field type of the field specified in the &lt;FieldName&gt; element determines which conditions are valid. If a condition is not specified, then the</li> </ul>	<pre> &lt;data:SearchLayout&gt; . . . &lt;data:ListOfDefaultSearchValues&gt; &lt;data:DefaultSearchField&gt; &lt;data:FieldName&gt;Indexed Boolean 0 &lt;/data:FieldName&gt; &lt;data:DefaultSearchCondition&gt;Is Checked &lt;/data:DefaultSearchCondition&gt; &lt;data:DefaultSearchValue&gt;Is Checked &lt;/data:DefaultSearchValue&gt; &lt;data:DefaultSearchValueAssocId/&gt; </pre>

Description	Element or Section
<p>default condition for the field type is used. For information about which filter conditions are valid for the various field types, see <i>Oracle CRM On Demand Online Help</i>.</p> <ul style="list-style-type: none"> <li>• &lt;DefaultSearchValue&gt; is the value that appears in the search field by default. For some filter conditions, such as Contains all values, more than one value can be specified. If more than one value is specified, then the values must be separated by commas. For fields of the check box type, the &lt;DefaultSearchValue&gt; element is always the same as the condition (either Is Checked, which is the default condition, or Is Not Checked).</li> <li>• &lt;DefaultSearchValueAssocId&gt; is the association ID (row ID) for a filter value for association control fields.</li> </ul>	<pre> &lt;/data:DefaultSearchField&gt; &lt;/data:ListOfDefaultSearchValues&gt; . . . &lt;/data:SearchLayout&gt; </pre>
<p>&lt;RestrictSearchToFieldsSelectedInRelatedInformationLayout&gt; corresponds to the Restrict Search to Fields Selected in Related Information Layout check box in the UI. In certain cases where a field is not displayed in a list of related records, the setting in this check box is considered to determine if the field is available as a search field for searches of related records even though the field is not displayed in the list of related records.</p>	<pre> &lt;data:SearchLayout&gt; . . . &lt;data:RestrictSearchToFieldsSelectedInRelatedInformationLayout&gt;false &lt;/data:RestrictSearchToFieldsSelectedInRelatedInformationLayout&gt; . . . &lt;/data:SearchLayout&gt; </pre>
<p>&lt;EnableDivisionAsDefaultSearchField&gt; corresponds to the Configure Lookup Window with Division as the Default Search Field check box in the UI. This element is applicable for search layouts for the Product record type only.</p> <p>If this element is set to true, then the Division field is the default search field and it is prepopulated with the user's primary division.</p> <p>If this element is set to false, then the Product Name field is the default search field, unless the &lt;EnableFirstTargetedFieldAsLookupDefault&gt; element is set to true, in which case the first field in the list of targeted search fields in the search layout is used as the default search field.</p>	<pre> &lt;data:SearchLayout&gt; . . . &lt;data:EnableDivisionAsDefaultSearchField&gt;false &lt;/data:EnableDivisionAsDefaultSearchField&gt; . . . &lt;/data:SearchLayout&gt; </pre>
<p>&lt;EnableDefaultFields&gt; corresponds to the Configure Lookup Window With Default Fields check box in the UI. It determines which fields appear in the search results in the Lookup windows for the record type, as follows:</p>	<pre> &lt;data:SearchLayout&gt; . . . &lt;data:EnableDefaultFields&gt;true &lt;/data:EnableDefaultFields&gt; . . . </pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>If this element is set to true, then a predefined set of fields is displayed in the search results in the Lookup windows for the record type.</li> <li>If this element is set to false, then the fields that are configured as the search fields for the Lookup window are also displayed in the search results in the Lookup window.</li> </ul>	<pre>&lt;/data:SearchLayout&gt;</pre>
<p>&lt;EnableDefaultSearchResults&gt; corresponds to the Show Search Results When Lookup Window Opens check box in the UI. It determines whether a list of available records is displayed in the Lookup window when it opens (true), or no records are displayed when the Lookup window opens (false).</p>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:EnableDefaultSearchResults&gt;true &lt;/data:EnableDefaultSearchResults&gt; . . . &lt;/data:SearchLayout&gt;</pre>
<p>&lt;EnableAutoResolve&gt; corresponds to the Auto-Resolve Enabled check box in the UI. It determines whether smart associations are enabled (true) or are not enabled (false). Smart associations are automatic searches that make it easier for users to associate records of different record types, such as account, contact, opportunity, activity, and so on with each other. For more information about smart associations, see <i>Oracle CRM On Demand Online Help</i>.</p>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:EnableAutoResolve&gt;true &lt;/data:EnableAutoResolve&gt; . . . &lt;/data:SearchLayout&gt;</pre>
<p>&lt;EnableDefaultCtxSensitiveList&gt; corresponds to the Show Context-Sensitive List as Lookup Window Default check box in the UI. It determines whether any available context-sensitive lists appear before the other lists in the record-type List field in the upper-left corner of Lookup windows (true), or appear after the system lists (false).</p> <p><b>Note:</b> This check box is effective only if the Show Context-Sensitive List as Lookup Window Default option is set to Enabled on the company profile.</p>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:EnableDefaultCtxSensitiveList&gt; false&lt;/data:EnableDefaultCtxSensitiveList&gt; . . . &lt;/data:SearchLayout&gt;</pre>
<p>&lt;EnableKeywordSearch&gt; corresponds to the Configure Enhanced Keyword Search with Selected Search Results Fields check box in the UI. It determines which fields appear in the search results when an enhanced keyword search is performed for the record type, as follows:</p>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:EnableKeywordSearch&gt;false &lt;/data:EnableKeywordSearch&gt; . . . &lt;/data:SearchLayout&gt;</pre>



Description	Element or Section
<ul style="list-style-type: none"> <li>If this element is set to true, then the fields that are configured as the search fields for the Lookup window are also displayed in the results of an enhanced keyword search.</li> <li>If this element is set to false, then a predefined set of fields is displayed in the results of an enhanced keyword search.</li> </ul>	
<p>&lt;EnableFirstTargetedFieldAsLookupDefault&gt; corresponds to the First Targeted Search Field as Default Search in Lookups check box in the UI. It determines whether the first field in the list of targeted search fields in the search layout is used as the default search field in the Quick Filter in the Lookup window (true), or the preconfigured default search field is used (false).</p> <p><b>Note:</b> For the Product record type only, the setting in the &lt;EnableDivisionAsDefaultSearchField&gt; element takes precedence over the setting of the &lt;EnableFirstTargetedFieldAsLookupDefault&gt; element.</p>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:EnableFirstTargetedFieldAsLookupDefault&gt;false &lt;/data:EnableFirstTargetedFieldAsLookupDefault&gt; . . . &lt;/data:SearchLayout&gt;</pre>
<p>&lt;EnableDefaultSort&gt; corresponds to the Auto-Populate Sort Field in New List and Advanced Search check box in the UI. It specifies whether the default sort field is automatically selected (true) or no sort field is automatically selected (false) when a user creates a new list or performs an advanced search for a single record type.</p>	<pre>&lt;data:SearchLayout&gt; . . . &lt;data:EnableDefaultSort&gt;&gt;true &lt;/data:EnableDefaultSort&gt; . . . &lt;/data:SearchLayout&gt;</pre>

## About the SearchOptimization Element

The <SearchOptimization> element for a field in a search layout indicates whether the field is optimized for fast search and also whether the field can be made case insensitive by selecting the Case Insensitive check box in an advanced search or in the Refine List page for a list. The possible values are as follows:

- A value of -1 indicates that the field is not optimized for fast search and is always case sensitive, regardless of the setting in the Case Insensitive check box in a search. The names of these fields appear in the default text color in the search layout wizard.
- A value of 1 indicates that the field is optimized for fast search and is always case sensitive, even when the Case Insensitive check box is selected in a search. The names of these fields appear in green text in the search layout wizard.
- A value of 2 indicates that the field is optimized for fast search and becomes case insensitive when the Case Insensitive check box is selected in a search. The names of these fields appear in blue text in the search layout wizard.

- A value of 3 indicates that the field is not optimized for fast search and is always case insensitive, regardless of the setting in the Case Insensitive check box in a search. The names of these fields appear in purple text in the search layout wizard.

## Migrating Search Layouts

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate search layouts:

- *Extracting a Single Search Layout*
- *Extracting All Search Layouts for a Single Object*
- *Extracting All Search Layouts for All Objects*
- *Updating or Inserting a Search Layout (Upsert)*

### Extracting a Single Search Layout

This topic describes how to extract a single custom search layout from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

The output from the Oracle Migration Tool On Demand client is saved in the following directory:

```
... \repository\SearchLayout\RecordType\SearchLayoutName.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single search layout:

```
migrationtool -u UserID -s ServerURL Read SearchLayout SystemNameOfObject  
SearchLayoutName
```

where:

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

### Example of Extracting a Single Search Layout

The following is an example of extracting a single search layout:

```
migrationtool -u UserID -s ServerURL Read SearchLayout Account "My Account Layout"
```

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the search layout name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Search Layouts for a Single Object

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

### Syntax

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

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

where:

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

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

### Example of Extracting All Search Layouts for a Single Object

The following is an example of extracting all search layouts for a single object:

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

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

## Extracting All Search Layouts for All Objects

This topic describes how to extract all of the custom search layouts for all objects from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

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

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

where:

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

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

## Updating or Inserting a Search Layout (Upsert)

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

### About the Upsert Operation

The `upsert` command inserts or updates search layouts based on the user key: `<LayoutName>` and `<ObjectName>`.

Oracle CRM On Demand attempts to locate the search layout specified in the input file based on the user key. If a match is located, then the search layout is updated. If Oracle CRM On Demand cannot locate a search layout based on the user key, then a new search layout is created for the specified record type.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update a search layout for an object:

```
migrationtool -u UserID -s ServerURL Upsert SearchLayout SearchLayoutXML
```

where:

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

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

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert SearchLayout "C:\My Files\My Account Search Layout.xml"
```

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

## Example of Updating or Inserting a Search Layout

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

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

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



# 21 Migrating Roles

## Migrating Roles

This chapter describes how to migrate roles using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Roles](#)
- [Privileges Required for Migrating Roles](#)
- [Elements and Sections in the Roles XML Output File](#)
- [Migrating Roles](#)

## Roles

A *role* in Oracle CRM On Demand is similar to a business function that a user performs within an organization, such as a sales executive function or a service manager function. Within your organization, your business function gives you certain privileges and permissions that are unique to your business function. Similarly, within the context of Oracle CRM On Demand, roles differentiate one business function from another by doing the following:

- Defining the features in Oracle CRM On Demand that a user has the privileges to use
- Defining the set of permissions the user is given to work with protected information
- Defining the user interface settings that display this information

The following table describes the Oracle Migration Tool On Demand client commands used with roles. For more information about running these commands, see [Migrating Roles](#).

Command	Description
<code>ReadAll Role</code>	This command exports all roles in the Oracle CRM On Demand tenant.
<code>Upsert Role RoleXML</code>	This command updates or inserts a role.  <b>Note:</b> For an update to occur, the criteria must match the value of the <RoleName> element, which is case sensitive. For example, Administrator and ADMINISTRATOR are two different values.

## Privileges Required for Migrating Roles

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

- For the `readAll` command: Enable Web Services Access, and Manage Roles and Access.
- For the `upsert` command: Enable Web Services Access, and Manage Roles and Access. To update the `<ExpirePasswordIn>` element, the Manage Company privilege is required.

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

## Elements and Sections in the Roles XML Output File

The following table describes the elements and sections in the roles XML output file.

Description	Element or Section
<code>&lt;RoleName&gt;</code> contains the system name of the role.	<code>&lt;data:RoleName&gt;MyCustomRole&lt;/data:RoleName&gt;</code>
<code>&lt;Description&gt;</code> contains the description for the role.	<code>&lt;data:Description&gt;OnDemand Role&lt;/data:Description&gt;</code>
<code>&lt;DefaultSalesProcess&gt;</code> contains the name of the default sales process specified for the role.	<code>&lt;data:DefaultSalesProcess&gt;Default Sales Process&lt;/data:DefaultSalesProcess&gt;</code>
<code>&lt;ThemeName&gt;</code> contains the name of the theme that is used by default when a user who is assigned this role signs in to Oracle CRM On Demand using a desktop or laptop computer.	<code>&lt;data:ThemeName&gt;Oracle&lt;/data:ThemeName&gt;</code>
<code>&lt;ModernThemeName&gt;</code> contains the name of the theme that is used by default when a user who is assigned this role signs in to Oracle CRM On Demand using a tablet computer or other touch-screen device, provided that the tablet computer or touch-screen device is detected by Oracle CRM On Demand.	<code>&lt;data:ModernThemeName&gt;Oracle Blue - Modern&lt;/data:ModernThemeName&gt;</code>
<code>&lt;LeadConversionLayout&gt;</code> contains the name of the lead conversion layout specified for the role.	<code>&lt;data:LeadConversionLayout&gt;&lt;/data:LeadConversionLayout&gt;</code>



Description	Element or Section
<p>&lt;ActionBarLayout&gt; contains the name of the Action bar layout specified for the role.</p>	<pre>&lt;data:ActionBarLayout&gt;Action Bar Standard Layout&lt;/data:ActionBarLayout&gt;</pre>
<p>&lt;RelatedInfoFormat&gt; specifies the format for related information sections on record detail pages, which can be shown as lists or as tabs.</p>	<pre>&lt;data:RelatedInfoFormat&gt;Tabs &lt;/data:RelatedInfoFormat&gt;</pre>
<p>&lt;ExpirePasswordIn&gt; specifies the length of time that a password is valid for a user who has this role. After this period has elapsed, the user is forced to change the password. If no value is specified, then the password expiry period that is defined for the company applies to the users who have this role.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• 30 days</li> <li>• 60 days</li> <li>• 90 days</li> <li>• 180 days</li> <li>• One Year</li> <li>• Never expires</li> </ul>	<pre>&lt;data:ExpirePasswordIn&gt;&lt;/data:ExpirePasswordIn&gt;</pre>
<p>&lt;LimitRecordsInListExport&gt; specifies the number of records that users who have this role can export at one time when exporting a list of records through the Export List menu option on List pages. By default, no restriction is applied and this element is empty.</p> <p><b>Note:</b> The restriction, if specified, applies only to exports that are performed through the Export List menu option on List pages. It does not apply to export operations that are performed through the Export Assistant or through any other channel.</p>	<pre>&lt;data:LimitRecordsInListExport&gt; &lt;/data:LimitRecordsInListExport&gt;</pre>
<p>The &lt;ListOfRoleTranslation&gt; section contains the translation values for the role.</p>	<pre>&lt;data:ListOfRoleTranslation&gt; . . . &lt;/data:ListOfRoleTranslation&gt;</pre>
<p>The &lt;RoleTranslation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter code for a language. For the list of language codes, see <i>Language</i></li> </ul>	<pre>&lt;data:ListOfRoleTranslation&gt; &lt;data:RoleTranslation&gt; &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt; &lt;data:ActivityListOnCalendarView&gt;My Appointments &lt;/data:ActivityListOnCalendarView&gt; &lt;data:RoleName&gt;My Custom Role&lt;/data:RoleName&gt; &lt;/data:RoleTranslation&gt;</pre>

Description	Element or Section
<p><i>Codes and Their Corresponding Language and Country.</i></p> <ul style="list-style-type: none"> <li>• &lt;RoleName&gt; contains the name for the role in the language identified by the language code.</li> <li>• &lt;ActivityListOnCalendarView&gt; contains the name of the activity list that is displayed in calendar pages for users who have this role, if an activity list is specified for the role.</li> </ul>	<pre> . . . &lt;/data:ListOfRoleTranslation&gt; </pre>
<p>The &lt;ListOfRecordTypeAccess&gt; section lists the record-type Access defined for each record type for the role.</p>	<pre> &lt;data:ListOfRecordTypeAccess&gt; . . . &lt;/data:ListOfRecordTypeAccess&gt; </pre>
<p>The &lt;RecordTypeAccess&gt; section specifies the record-type Access defined for each record type for users who have this role, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;RecordName&gt; contains the system name of the record type (object), which never changes. The system names for the record types are listed in <i>System Names for Record Types</i>.</li> <li>• &lt;HasAccess&gt; determines whether the user has access to the records of the specified record type (true) or does not have access to records of the specified record type (false).</li> <li>• &lt;CanCreate&gt; determines whether the user can create records of the specified record type (true) or cannot create records of the specified record type (false).</li> <li>• &lt;CanReadAll&gt; determines whether the user has read all records of the specified record type (true) or does not have access to all records of the specified record type (false).</li> </ul>	<pre> &lt;data:ListOfRecordTypeAccess&gt; &lt;data:RecordTypeAccess&gt; &lt;data:RecordName&gt;CustomObject10 &lt;/data:RecordName&gt; &lt;data:HasAccess&gt;true&lt;/data:HasAccess&gt; &lt;data:CanCreate&gt;true&lt;/data:CanCreate&gt; &lt;data:CanReadAll&gt;true&lt;/data:CanReadAll&gt; &lt;/data:RecordTypeAccess&gt; &lt;data:RecordTypeAccess&gt; &lt;data:RecordName&gt;Account &lt;/data:RecordName&gt; &lt;data:HasAccess&gt;true&lt;/data:HasAccess&gt; &lt;data:CanCreate&gt;true&lt;/data:CanCreate&gt; &lt;data:CanReadAll&gt;true&lt;/data:CanReadAll&gt; &lt;/data:RecordTypeAccess&gt; . . . &lt;/data:ListOfRecordTypeAccess&gt; </pre>
<p>The &lt;AccessProfile&gt; section specifies the access profiles that are assigned to the role, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;DefaultAccessProfile&gt; contains the name of the default access profile for the role.</li> <li>• &lt;OwnerAccessProfile&gt; contains the name of the owner access profile for the role.</li> </ul>	<pre> &lt;data:AccessProfile&gt; &lt;data:DefaultAccessProfile&gt;Administrator Default Access Profile &lt;/data:DefaultAccessProfile&gt; &lt;data:OwnerAccessProfile&gt;Administrator Owner Access Profile &lt;/data:OwnerAccessProfile&gt; &lt;/data:AccessProfile&gt; </pre>
<p>The &lt;ListofPrivilege&gt; section specifies the privilege settings for the role.</p>	<pre> &lt;data:ListofPrivilege&gt; . . . &lt;/data:ListofPrivilege&gt; </pre>

Description	Element or Section
<p>The &lt;Privilege&gt; section specifies the details of one privilege for the role:</p> <ul style="list-style-type: none"> <li>• &lt;PrivilegeName&gt; contains the system name of the privilege. For information about privilege IDs, their corresponding names, and descriptions, see <i>Privilege IDs and Their Corresponding Names and Descriptions</i>.</li> <li>• &lt;Enabled&gt; specifies whether the privilege is enabled for the role (true) or is not enabled for the role (false).</li> </ul>	<pre>&lt;data:ListOfPrivilege&gt;   &lt;data:Privilege&gt;     &lt;data:PrivilegeName&gt;ACCESS_ATT_EXPORT   &lt;/data:PrivilegeName&gt;     &lt;data:Enabled&gt;&gt;false&lt;/data:Enabled&gt;   &lt;/data:Privilege&gt;   . . . &lt;/data:ListOfPrivilege&gt;</pre>
<p>The &lt;TabAccessAndOrder&gt; section contains the details of the tab access and order for the role.</p>	<pre>&lt;data:TabAccessAndOrder&gt; . . . &lt;/data:TabAccessAndOrder&gt;</pre>
<p>The &lt;ListOfAvailableTab&gt; section contains the details of the tabs that are available to users who have this role, but are not displayed by default. This section corresponds to the Available Tabs list in the Role Management wizard. The &lt;AvailableTab&gt; child element contains the system name of the record type for the tab.</p> <p>For more information about mapping the XML values from the &lt;AvailableTab&gt; element to their corresponding UI names, see the table in <i>System Names for Record Types</i>.</p>	<pre>&lt;data:TabAccessAndOrder&gt;   &lt;data:ListOfAvailableTab&gt;     &lt;data:AvailableTab&gt;Account&lt;/data:AvailableTab&gt;     &lt;data:AvailableTab&gt;Forecasts&lt;/data:AvailableTab&gt;     &lt;data:AvailableTab&gt;Leads&lt;/data:AvailableTab&gt;     . . .   &lt;/data:ListOfAvailableTab&gt;   . . . &lt;/data:TabAccessAndOrder&gt;</pre>
<p>The &lt;List of Selected Tab&gt; section contains the details of the tabs that are displayed by default for users who have this role. This section corresponds to the Selected Tabs list in the Role Management wizard. The elements in the section are:</p> <ul style="list-style-type: none"> <li>• &lt;TabName&gt; contains the system name of the record type for the tab.</li> <li>• &lt;Order&gt; indicates the order of the tab in the Selected Tabs list. The order of value 0 (zero) corresponds to the first tab in the Selected Tabs section in the UI.</li> </ul> <p>For more information about mapping the XML values from the &lt;TabName&gt; element to their corresponding UI names, see the table in <i>System Names for Record Types</i>.</p>	<pre>&lt;data:TabAccessAndOrder&gt; . . .   &lt;data:ListOfSelectedTab&gt;     &lt;data:SelectedTab&gt;       &lt;data:TabName&gt;Home&lt;/data:TabName&gt;       &lt;data:Order&gt;0&lt;/data:Order&gt;     &lt;/data:SelectedTab&gt;     &lt;data:SelectedTab&gt;       &lt;data:TabName&gt;Accounts&lt;/data:TabName&gt;       &lt;data:Order&gt;1&lt;/data:Order&gt;     &lt;/data:SelectedTab&gt;     &lt;data:SelectedTab&gt;       &lt;data:TabName&gt;Contacts&lt;/data:TabName&gt;       &lt;data:Order&gt;2&lt;/data:Order&gt;     &lt;/data:SelectedTab&gt;     &lt;data:SelectedTab&gt;       &lt;data:TabName&gt;Leads&lt;/data:TabName&gt;       &lt;data:Order&gt;3&lt;/data:Order&gt;     &lt;/data:SelectedTab&gt;     . . .   &lt;/data:ListOfSelectedTab&gt; &lt;/data:TabAccessAndOrder&gt;</pre>

Description	Element or Section
<p>The &lt;ListOfPageLayoutAssignment&gt; section contains the details of the page layout assignments for the role.</p>	<pre>&lt;data:ListOfPageLayoutAssignment&gt; . . . &lt;/data:ListOfPageLayoutAssignment&gt;</pre>
<p>The &lt;PageLayoutAssignment&gt; section contains the details of the page layout assignment for one record type for the role:</p> <ul style="list-style-type: none"> <li>• &lt;RecordType&gt; is the system name of the record type (object), which never changes. For more information about mapping the XML values from the &lt;RecordType&gt; element to their corresponding UI names, see the table in <i>System Names for Record Types</i>.</li> <li>• &lt;LayoutName&gt; specifies the name of the page layout for the record type for this role. If the &lt;LayoutName&gt; element is not specified, then the default layout is applied. If the &lt;PageViewType&gt; has the Dynamic value, then the layout specified in the &lt;LayoutName&gt; must be a dynamic layout. For more information about dynamic page layouts, see <i>Migrating Dynamic Page Layouts</i>.</li> <li>• &lt;PageViewType&gt; specifies whether the page layout is a static layout or a dynamic layout. The &lt;PageViewType&gt; element value must be either Static or Dynamic.</li> </ul>	<pre>&lt;data:ListOfPageLayoutAssignment&gt; &lt;data:PageLayoutAssignment&gt; &lt;data:RecordType&gt;UserAdmin &lt;/data:RecordType&gt; &lt;data:LayoutName&gt;&lt;/data:LayoutName&gt; &lt;data:PageViewType&gt;Static &lt;/data:PageViewType&gt; &lt;/data:PageLayoutAssignment&gt; &lt;data:PageLayoutAssignment&gt; &lt;data:RecordType&gt;Account &lt;/data:RecordType&gt; &lt;data:LayoutName&gt;&lt;/data:LayoutName&gt; &lt;data:PageViewType&gt;Static &lt;/data:PageViewType&gt; &lt;/data:PageLayoutAssignment&gt; . . . &lt;/data:ListOfPageLayoutAssignment&gt;</pre>
<p>The &lt;ListOfSearchLayoutAssignment&gt; section contains the details of the search layout assignments for the role.</p>	<pre>&lt;data:ListOfSearchLayoutAssignment&gt; . . . &lt;/data:ListOfSearchLayoutAssignment&gt;</pre>
<p>The &lt;SearchLayoutAssignment&gt; section contains the details of the page layout assignment for one record type for the role:</p> <ul style="list-style-type: none"> <li>• &lt;RecordType&gt; is the system name of the record type (object), which never changes. For more information about mapping the XML values from the &lt;RecordType&gt; element to their corresponding UI names, see the table in <i>System Names for Record Types</i>.</li> <li>• &lt;LayoutName&gt; specifies the name of the search layout for the record type for this role.</li> </ul>	<pre>&lt;data:ListOfSearchLayoutAssignment&gt; &lt;data:SearchLayoutAssignment&gt; &lt;data:RecordType&gt;Account&lt;/data:RecordType&gt; &lt;data:LayoutName&gt;AccountSearch &lt;/data:LayoutName&gt; &lt;/data:SearchLayoutAssignment&gt; &lt;data:SearchLayoutAssignment&gt; &lt;data:RecordType&gt;Opportunity&lt;/data:RecordType&gt; &lt;data:LayoutName&gt;&lt;/data:LayoutName&gt; &lt;/data:SearchLayoutAssignment&gt; . . . &lt;/data:ListOfSearchLayoutAssignment&gt;</pre>
<p>The &lt;ListOfHomePageLayoutAssignment&gt;</p>	<pre>&lt;data:ListOfHomePageLayoutAssignment&gt; . . .</pre>

Description	Element or Section
section contains details of the homepage layout assignments for the role.	<pre>&lt;/data:ListOfHomepageLayoutAssignment&gt;</pre>
<p>The &lt;HomepageLayoutAssignment&gt; section contains the details of the homepage layout assignment for one record type for the role:</p> <ul style="list-style-type: none"> <li>• &lt;RecordType&gt; is the system name of the record type (object), which never changes. For more information about mapping the XML values from the &lt;RecordType&gt; element to their corresponding UI names, see the table in <i>System Names for Record Types</i>.</li> <li>• &lt;LayoutName&gt; specifies the name of the homepage layout for the record type for this role.</li> </ul>	<pre>&lt;data:ListOfHomepageLayoutAssignment&gt; &lt;data:HomepageLayoutAssignment&gt; &lt;data:RecordType&gt;Homepage&lt;/data:RecordType&gt; &lt;data:LayoutName&gt;My Homepage Custom Layout&lt;/data:LayoutName&gt; &lt;/data:HomepageLayoutAssignment&gt; &lt;data:HomepageLayoutAssignment&gt; &lt;data:RecordType&gt;Program&lt;/data:RecordType&gt; &lt;data:LayoutName&gt;&lt;/data:LayoutName&gt; &lt;/data:HomepageLayoutAssignment&gt; &lt;data:HomepageLayoutAssignment&gt; &lt;data:RecordType&gt;Partner&lt;/data:RecordType&gt; &lt;data:LayoutName&gt;&lt;/data:LayoutName&gt; &lt;/data:HomepageLayoutAssignment&gt; &lt;data:HomepageLayoutAssignment&gt; &lt;data:RecordType&gt;Account&lt;/data:RecordType&gt; &lt;data:LayoutName&gt;My Custom Account Homepage Layout&lt;/data:LayoutName&gt; &lt;/data:HomepageLayoutAssignment&gt; . . . &lt;/data:ListOfHomepageLayoutAssignment&gt;</pre>

## Migrating Roles

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

- *Extracting All Roles*
- *Updating or Inserting a Specific Role (Upsert)*

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

## Extracting All Roles

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

### Syntax

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

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

where:

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

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

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

## Example of Extracting All Roles

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

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

## Updating or Inserting a Specific Role (Upsert)

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

### Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert Role RoleXML
```

where:

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

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

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

## Example of Updating or Inserting a Role

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

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

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

# 22 Migrating Integration Event Queue Configuration Data

## Migrating Integration Event Queue Configuration Data

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

- *Integration Event Queues*
- *Privileges Required for Migrating Integration Event Queue Configuration Data*
- *Elements and Sections in the Integration Event Queue XML Output File*
- *Migrating Integration Event Queue Configuration Data*
- *About Clearing Transactions from Integration Event Queues*

## Integration Event Queues

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

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

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

# Privileges Required for Migrating Integration Event Queue Configuration Data

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

- For the `read` and `readAll` commands: Enable Web Services Access. In addition, Integration Event Administration must be set up for your company.
- For the `upsert` command: Enable Web Services Access, and Manage Integration Event Queues.

In addition, to use the `read`, `readAll`, and `upsert` commands, Integration Event Administration must be set up for your company.

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

# Elements and Sections in the Integration Event Queue XML Output File

The following table describes the elements and sections in the integration event queue XML output file.

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



Description	Element or Section
queue, with the date and time that the queue was created. This element is read-only and is ignored for upsert requests.	<pre>&lt;data:Created&gt;SysAdmin, 05/21/2017 04:40:52&lt;/data:Created&gt; . . . &lt;/data:IntegrationEventQueue&gt;</pre>
<Modified> contains the user name of the user who last modified the integration event queue configuration, with the date and time that the queue configuration was last modified. This element is read-only and is ignored for upsert requests.	<pre>&lt;data:IntegrationEventQueue&gt; . . . &lt;data:Modified&gt;SysAdmin, 06/19/2017 06:26:52&lt;/data:Modified&gt; . . . &lt;/data:IntegrationEventQueue&gt;</pre>
<FileLimit> shows the total number of events that your company can store for all queues. If the combined size of the existing queues matches this number, then you cannot create a new queue. This element is read-only and is ignored for upsert requests.	<pre>&lt;data:IntegrationEventQueue&gt; . . . &lt;data:FileLimit&gt;500&lt;/data:FileLimit&gt; . . . &lt;/data:IntegrationEventQueue&gt;</pre>
<UnassignedQueueCapacity> shows the remaining capacity for all integration event queues. This element is read-only and is ignored for upsert requests.	<pre>&lt;data:IntegrationEventQueue&gt; . . . &lt;data:UnassignedQueueCapacity&gt;70 &lt;/data:UnassignedQueueCapacity&gt; . . . &lt;/data:IntegrationEventQueue&gt;</pre>
<QueueSize> specifies the size of the queue. When you create a new queue, the size of the queue cannot exceed the remaining capacity, which is shown in the <UnassignedQueueCapacity> element.	<pre>&lt;data:IntegrationEventQueue&gt; . . . &lt;data:QueueSize&gt;10&lt;/data:QueueSize&gt; . . . &lt;/data:IntegrationEventQueue&gt;</pre>
<p>&lt;NumberOfTransactions&gt; shows the number of transactions currently in the queue. This element is read-only and is ignored for upsert requests.</p> <p><b>Note:</b> For information about clearing integration events from queues, see <a href="#">About Clearing Transactions from Integration Event Queues</a>.</p>	<pre>&lt;data:IntegrationEventQueue&gt; . . . &lt;data:NumberOfTransactions&gt;0 &lt;/data:NumberOfTransactions&gt; . . . &lt;/data:IntegrationEventQueue&gt;</pre>
<NotificationEmailAddress> is the email address to which a warning email is to be sent when the queue is full or when the queue reaches a certain size, if a warning email is to be sent.	<pre>&lt;data:IntegrationEventQueue&gt; . . . &lt;data:NotificationEmailAddress&gt; jane.doe@company.com &lt;/data:NotificationEmailAddress&gt; . . . &lt;/data:IntegrationEventQueue&gt;</pre>
<WarningMailQueueSize> specifies the size that the queue is allowed to reach before a warning email is	<pre>&lt;data:IntegrationEventQueue&gt; . . . &lt;data:WarningMailQueueSize&gt;5 &lt;/data:WarningMailQueueSize&gt;</pre>

Description	Element or Section
<p>sent to the address specified in the &lt;NotificationEmailAddress&gt; element.</p>	<pre>                 . . .             &lt;/data:IntegrationEventQueue&gt;         </pre>
<p>&lt;TimeZone&gt; specifies how the dates and times are recorded in the integration events that are created using the Web Services v1.0 Schema and written to this queue. The valid values are:</p> <ul style="list-style-type: none"> <li>• <b>UTC Format.</b> If this value is specified, then the date and time in the GMT time zone are recorded, in the format specified by the W3C standard for Coordinated Universal Time (UTC), as follows:  <b>YYYY-MM-DDTHH:MM:SSZ</b>  For example, 2017-06-12T09:44:15Z, which corresponds to June 12th 2017, 9:44:15 GMT.</li> </ul> <p><b>Note:</b> Fractions of seconds are not recorded.</p> <ul style="list-style-type: none"> <li>• <b>UTC.</b> If this value is specified, then the date and time in the GMT time zone are recorded, in the following format:  <b>MM/DD/YYYY HH:MM:SS</b>  For example, 06/12/2017 09:44:15, which corresponds to June 12th 2017, 9:44:15 GMT.</li> <li>• <b>User Time Zone.</b> If this value is specified, then the date and time in the time zone of the user who updated the record are recorded, in the following format:  <b>MM/DD/YYYY HH:MM:SS</b>  For example, 06/12/2017 09:44:15, which corresponds to June 12th 2017, 9:44:15, in the user's time zone.</li> </ul> <p><b>Note:</b> You can set the Time Zone field for the Default Queue only. All other queues inherit the setting that is selected for the Default Queue.</p>	<pre>                 &lt;data:IntegrationEventQueue&gt;                 . . .                 &lt;data:TimeZone&gt;User Time Zone&lt;/data:TimeZone&gt;             &lt;/data:IntegrationEventQueue&gt;         </pre>
<p>&lt;PicklistFormat&gt; specifies the format for recording picklist field values in the integration events, as follows:</p>	<pre>                 &lt;data:IntegrationEventQueue&gt;                 . . .                 &lt;data:PicklistFormat&gt;User Language         </pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• <b>LIC.</b> If this value is specified, then the picklist values are recorded as language-independent code (LIC) values.</li> </ul> <p><b>Note:</b> The LIC values in picklists are usually the same as the values in the English-United States (ENU) locale.</p> <ul style="list-style-type: none"> <li>• <b>User Language.</b> If this value is specified, then the picklist values are recorded in the language of the user whose action causes the integration event to be created.</li> </ul> <p><b>Note:</b> After a queue is created, the Picklist Format field becomes read-only and you cannot change it, either in the UI or through an upsert operation. If you want to change the picklist format of an integration event queue, then contact Oracle CRM On Demand Customer Care, and ask them to change it for you.</p>	<pre> &lt;/data:PicklistFormat&gt; . . . &lt;/data:IntegrationEventQueue&gt; </pre>
<p>&lt;W3CFormat&gt; specifies the format in which the field values are recorded in the integration events that are created using the Web Services v2.0 Schema and written to this queue, as follows:</p> <ul style="list-style-type: none"> <li>• If this element is set to true, then the values in all fields are recorded in the format specified by the W3C for Web Services v2.0 Schema integration events.</li> <li>• If this element is set to false, then the values in Date and Boolean field types are recorded in the format that was used in releases earlier than Release 41 of Oracle CRM On Demand. The values in all other fields are recorded in the format specified by the W3C for Web Services v2.0 Schema integration events.</li> </ul> <p>The default value is false. If you set the value to true when inserting or updating the integration event queue data, then after the queue is created or updated, the &lt;W3CFormat&gt; field becomes read-only and it cannot be changed.</p>	<pre> &lt;data:IntegrationEventQueue&gt; . . . &lt;data:W3CFormat&gt;false&lt;/data:W3CFormat&gt; . . . &lt;/data:IntegrationEventQueue&gt; </pre>

# Migrating Integration Event Queue Configuration Data

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

- [Extracting a Single Integration Event Queue](#)
- [Extracting All Integration Event Queues](#)
- [Updating or Inserting an Integration Event Queue \(Upsert\)](#)

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

## Extracting a Single Integration Event Queue

This topic describes how to extract the configuration data for a single integration event queue from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

The output from the Oracle Migration Tool On Demand client is saved in the following directory:

```
...\repository\IntegrationEventQueue\queueName.xml
```

### Syntax

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

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

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *QueueName* is the name of the integration event queue for which you want to extract the configuration data.

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

## Example of Extracting a Single Integration Event Queue

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

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

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

## Extracting All Integration Event Queues

This topic describes how to extract the configuration data for all of the integration event queues from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the configuration data for all of the integration event queues:

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

where:

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

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

## Updating or Inserting an Integration Event Queue (Upsert)

This topic describes how to update the configuration data for an integration event queue (if the queue exists) or insert an integration event queue (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The `upsert` command inserts or updates integration event queue configuration data based on the user key: `<QueueName>`.

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

### Syntax

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

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

where:

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

- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *IntegrationEventQueueXML* is the fully qualified path name of the integration event queue XML file, for example:

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

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

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

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

## Example of Updating or Inserting the Configuration Data for an Integration Event Queue

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

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

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

## About Clearing Transactions from Integration Event Queues

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

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

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

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

```
YYYY-MM-DDTHH:MM:SS
```

In the string:

- *YYYY* specifies the year
- *MM* specifies the month

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

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

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

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

This example shows a time expressed in UTC:

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

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

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

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

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

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





# 23 Migrating Workflow Rules, Action Sets, and User Sets

## Migrating Workflow Rules and Action Sets

This chapter describes how to migrate workflow rules, action sets, and user sets using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Workflow Rules](#)
- [Workflow Action Sets](#)
- [Workflow User Sets](#)
- [Privileges Required for Migrating Workflow Rules and Action Sets](#)
- [Privileges Required for Migrating Workflow User Sets](#)
- [Elements and Sections in the Workflow Rules Output File](#)
- [Elements and Sections in the Workflow Action Sets Output File](#)
- [Elements and Sections in the Workflow User Sets Output File](#)
- [Migrating Workflow Rules](#)
- [Migrating Workflow Action Sets](#)
- [Migrating Workflow User Sets](#)

## Workflow Rules

A *workflow rule* is an instruction to Oracle CRM On Demand to perform one or more actions automatically, each time a specified event occurs. The following table describes the Oracle Migration Tool On Demand client commands that are used with workflow rules. The commands are case sensitive. For examples of running these commands, see [Migrating Workflow Rules](#).

Command	Description
<code>Read WorkflowRuleSet RecordType TriggerEvent [ParentRecordType] [WorkflowName]</code>	<p>This command exports a set of workflow rules or a single workflow rule from an Oracle CRM On Demand server. At a minimum, you must specify a record type and a trigger event, or else specify a workflow rule name together with empty values for the record type, trigger event, and parent record type parameters. An empty value is specified as a set of double quotation marks (""). The parameters are as follows:</p> <ul style="list-style-type: none"> <li>• <i>RecordType</i> is the system name of the record type for the set of workflow rules. If you specify a workflow rule name in the command, then you do not need to specify a record type, but you must include an empty value for the <i>RecordType</i> parameter.</li> <li>• <i>TriggerEvent</i> is the code for the trigger event, see the table in <a href="#">Language-Independent Codes for Trigger Events</a>. If you specify a record type, then you must specify a trigger event. If you specify a workflow rule name, then you do not need to specify a trigger event, but you must include an empty value for the <i>TriggerEvent</i> parameter.</li> </ul>

Command	Description
	<ul style="list-style-type: none"> <li><i>ParentRecordType</i> is the system name of the parent record type for the workflow rules. This parameter is applicable only if the workflow rule has a parent record and the trigger event is Associate or Dissociate. If you specify a workflow rule name in the command, and if you do not want to specify a parent record type, then you must include an empty value for the <i>ParentRecordType</i> parameter.</li> <li><i>WorkflowName</i> is the name of the workflow rule. You can read an individual workflow rule by specifying a value for the <i>WorkflowName</i> parameter.</li> </ul>
<code>ReadAll WorkflowRuleSet</code>	This command exports all workflow rules from an Oracle CRM On Demand server.
<code>Upsert WorkflowRuleSet WorkflowRulesXML</code>	<p>This command updates or inserts a set of workflow rules on an Oracle CRM On Demand server.</p> <p><b>Note:</b> When you use the <code>Upsert</code> command, you must include all of the definition for the workflow rule set in the XML file. Otherwise, some content might be unintentionally removed when you run the <code>Upsert</code> command, because the <code>Upsert</code> command deletes any existing workflow rules for which it does not find a match in the input XML file. For example, if the existing rule sets for a trigger event are not included in the XML file used for the <code>Upsert</code> command, then these rule sets are deleted. For more information about considerations that apply to the <code>Upsert</code> command, see <a href="#">Considerations That Apply to Upsert Operations</a>.</p>
<code>Delete WorkflowRuleSet RecordType TriggerEvent [ParentRecordType] [WorkflowName]</code>	<p>This command deletes the specified workflow rules from an Oracle CRM On Demand server. At a minimum, you must specify a record type and a trigger event, or else specify a workflow rule name together with empty values for the record type, trigger event, and parent record type parameters. An empty value is specified as a set of double quotation marks (""). The parameters are as follows:</p> <ul style="list-style-type: none"> <li><i>RecordType</i> is the system name of the record type for the set of workflow rules. If you specify a workflow rule name in the command, then you do not need to specify a record type, but you must include an empty value for the <i>RecordType</i> parameter.</li> <li><i>TriggerEvent</i> is the code for the trigger event, see the following table. If you specify a record type, then you must specify a trigger event. If you specify a workflow rule name in the command, then you do not need to specify a trigger event, but you must include an empty value for the <i>TriggerEvent</i> parameter.</li> <li><i>ParentRecordType</i> is the system name of the parent record type for the workflow. This parameter is applicable only if the workflow has a parent record and the trigger event is Associate or Dissociate. If you specify a workflow rule name in the command, and if you do not want to specify a parent record type, then you must include an empty value for the <i>ParentRecordType</i> parameter.</li> <li><i>WorkflowName</i> is the name of the workflow rule. This parameter is optional. You can delete an individual workflow rule by specifying a value for the <i>WorkflowName</i> parameter.</li> </ul>
<code>InsertOrUpdate WorkflowRuleSet WorkflowRulesXML</code>	<p>This command updates a workflow rule if there is a matching workflow rule. If there is not a matching workflow rule, then the command inserts a new workflow rule.</p> <p><b>Note:</b> Unlike the <code>Upsert</code> command, the <code>InsertOrUpdate</code> command does not delete any existing workflow rule for which it does not find a match in the input XML file.</p>

The output from the extraction is saved to the *TriggerEvent.xml* file as follows:

- If the *ParentRecordType* parameter has an empty value, then the output is saved to the following directory:

```
.../repository/WorkflowRuleSet/RecordType
```

- If the *ParentRecordType* parameter does not have an empty value, then the output is saved to the following directory:

```
.../repository/WorkflowRuleSet/RecordType/ParentRecordType
```

The directory structure is automatically created. The structure is based on the unique combination of the record type, and parent record type, if applicable, and the trigger event. The exported XML files do not contain any workflow rule set that is based on a different record type or trigger event.

## Considerations That Apply to Upsert Operations

When you run the `upsert` command for workflow rules, the existing workflow rules are updated, new workflow rules are inserted, and rules that are not in the request are deleted. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

The following considerations apply to Upsert operations for workflow rules:

- The workflow rules are ordered as they appear in the input XML file.
- You cannot upsert two workflow rules with the same order number.
- If the workflow rule name does not match an existing workflow rule name, then a new workflow rule is created.
- If the workflow rule name matches an existing workflow rule name, then the record type and trigger event cannot be modified.
- The migration service protects data from becoming corrupted if the workflow rule is edited during loading, or loaded twice simultaneously, or extracted while it is being loaded.
- The input file must contain only the workflow rules that are based on a unique combination of a record type and trigger event. For example, the input file can contain one or many workflow rules based on the Account record type and the When New Record Saved trigger event. The input file cannot contain another workflow rule with a different record type or trigger event.
- The user running the `upsert` command must have access to the object so that the `upsert` command completes successfully.

## About Inserting, Updating, and Deleting Scheduled Events

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

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

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

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

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

## Language-Independent Codes for Trigger Events

The following table maps the workflow trigger events to the trigger event language-independent code (LIC).

Trigger Event	Trigger Event Language-Independent Code
When New Record Saved	WriteRecordNew
When Modified Record Saved	WriteRecordUpdated
Before Modified Record Saved	PreWriteRecord
Before Record Is Deleted	PreDeleteRecord
After Association With Parent	Associate
After Dissociation From Parent	Dissociate
When Record Is Restored	RestoreRecord
When Records Are Merged	MergeRecords
Scheduled Event	ScheduledEvent

## Workflow Action Sets

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

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

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

The following table describes the Oracle Migration Tool On Demand client commands that are used with workflow actions and workflow action sets. The commands are case sensitive. For examples of running these commands, see *Migrating Workflow Action Sets*.

Command	Description
<b>Read WorkflowActionSet</b> <i>WorkflowRuleName</i> <i>[WorkflowActionName]</i> <i>[ActiveFlag]</i>	<p>This command exports a set of workflow actions or a single workflow action for a specified workflow rule from an Oracle CRM On Demand server. The parameters are as follows:</p> <ul style="list-style-type: none"> <li><i>WorkflowRuleName</i> is the name of the workflow rule.</li> <li><i>WorkflowActionName</i> is the name of a workflow action on the specified rule. This is an optional parameter. However, if you do not want to specify a workflow action name, and if you want to use the <i>ActiveFlag</i> argument to filter the workflow actions that are exported, then you must specify an empty value for the <i>WorkflowActionName</i> parameter. An empty value is specified as a set of double quotation marks ("").</li> <li><i>ActiveFlag</i> is an optional argument that you can use to filter the workflow actions that are exported, based on the value of the Active check box on the workflow actions. The valid values are true (the Active check box is selected) and false (the Active check box is not selected).</li> </ul>
<b>ReadForRuleSet WorkflowActionSet</b> <i>RecordType TriggerEvent</i>	<p>This command exports all the actions for each workflow rule that is based on the specified record type and trigger event from an Oracle CRM On Demand server.</p>
<b>Upsert WorkflowActionSet</b> <i>WorkflowActionSetXML</i>	<p>This command updates or inserts a workflow action set on an Oracle CRM On Demand server.</p> <p><b>Note:</b> When you use the <b>Upsert</b> command, you must include all of the definition for the workflow action set in the XML file. Otherwise, some content might be unintentionally removed when you run the <b>Upsert</b> command, because the <b>Upsert</b> command deletes any existing workflow actions for which it does not find a match in the input XML file. For example, if the existing actions for a trigger event are not part of the XML file used for the <b>Upsert</b> command, then these actions are deleted.</p>
<b>InsertOrUpdate WorkflowActionSet</b> <i>WorkflowActionSetXML</i>	<p>This command updates a workflow action set if there is a matching workflow action set. If there is not a matching workflow action set, then the command inserts a new workflow action set.</p> <p><b>Note:</b> Unlike the <b>Upsert</b> command, the <b>InsertOrUpdate</b> command does not delete any existing workflow action for which it does not find a match in the input XML file.</p>

## Workflow User Sets

A *workflow user set* is a list of users on whose behalf the workflow actions of a scheduled event for the Analytics record type will be executed. This corresponds to the Execute As related information section in the Workflow Rule Detail page in the UI.

For more information about creating scheduled events for Analytics, see *Oracle CRM On Demand Online Help*.

The following table describes the Oracle Migration Tool On Demand client commands that are used with workflow user sets. The commands are case sensitive. For examples of running these commands, see *Migrating Workflow User Sets*.

Command	Description
<b>ReadForRuleSet WorkflowUserSet</b> <i>RecordType TriggerEvent</i> <i>[ParentRecordType]</i>	<p>This command exports all the user sets for each workflow rule that is based on the Analytics record type and trigger event of ScheduledEvent from an Oracle CRM On Demand server.</p>

Command	Description
	<ul style="list-style-type: none"> <li>• <i>RecordType</i> is always Analytics</li> <li>• <i>TriggerEvent</i> is always ScheduledEvent.</li> </ul>
<b>InsertOrUpdate WorkflowUserSet WorkflowUsersXML</b>	This command inserts a new workflow user set.
<b>Delete WorkflowUserSet WorkflowName UserId UserLoginName</b>	This command deletes a user from a workflow user set for a specified workflow rule.

## Privileges Required for Migrating Workflow Rules and Action Sets

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

- For the **Read** and **ReadAll** commands: Enable Web Services Access.
- For the **Upsert** and **InsertOrUpdate** commands: Manage Data Rules - Manage Workflow Rules, Manage Data Rules - Manage Workflow Rules for Users (for workflow rules and actions for the User record type only), and Workflow Cancel Save (if applicable). The Workflow Cancel Save privilege is required if the Cancel Save setting is to be updated or inserted.

The Workflow Cancel Save privilege is required if the trigger event for the workflow rule is Before Modified Record Saved and the Cancel Save option is available for the record type. The Workflow Cancel Save privilege is not required for the Opportunity record type because the Cancel Save option is available with the Manage Data Rules - Manage Workflow Rules privilege.

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

## Privileges Required for Migrating Workflow User Sets

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

- For the **ReadForRuleSet** command: Enable Web Services Access.
- For the **InsertOrUpdate** and **Delete** commands: Manage Data Rules - Manage Workflow Rules.

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

## Elements and Sections in the Workflow Rules Output File

The following table describes the elements and sections in the workflow rules XML file.

**Note:** Certain elements are applicable only for workflow rules that have the Scheduled Event trigger event. These elements are described in the second table in this topic.

Description	Element or Section
<TriggerEvent> specifies the trigger event code that triggers the workflow.	<code>&lt;data:TriggerEvent&gt;WriteRecordNew &lt;/data:TriggerEvent&gt;</code>
(Optional.) <ParentRecordType> specifies the system name of the parent record type. It is specified if the trigger event is Associate or Dissociate. See <i>Oracle CRM On Demand Online Help</i> or the Workflow UI for the valid combination of RecordType, TriggerEvent, and ParentRecordType.	<code>&lt;data:ParentRecordType&gt; &lt;/data:ParentRecordType&gt;</code>
The <WorkflowRule> section contains the elements for one workflow rule.	<code>&lt;data:WorkflowRule&gt; . . . &lt;/data:WorkflowRule&gt;</code>
<WorkflowName> specifies the name of the workflow rule. This field has a maximum of 50 characters.	<code>&lt;data:WorkflowRule&gt; . . . &lt;data:WorkflowName&gt;Opportunity Rule &lt;/data:WorkflowName&gt; . . . &lt;/data:WorkflowRule&gt;</code>
<Active> specifies whether the rule is active (true) or inactive (false).	<code>&lt;data:WorkflowRule&gt; . . . &lt;data:Active&gt;&gt;true&lt;/data:Active&gt; . . . &lt;/data:WorkflowRule&gt;</code>
<Exit> specifies whether Oracle CRM On Demand exits the sequence of workflow rules after this rule is executed (true), or does not exit the sequence of workflow rules after this rule is executed (false).	<code>&lt;data:WorkflowRule&gt; . . . &lt;data:Exit&gt;&gt;false&lt;/data:Exit&gt; . . . &lt;/data:WorkflowRule&gt;</code>

**Note:** For workflow rules that have the Scheduled Event trigger event, the <Exit> element is always set to true and is read-only.

Description	Element or Section
<p>&lt;WorkflowRuleCondition&gt; is a valid expression, as defined in the <i>Oracle CRM On Demand Online Help</i>, that defines a rule for performing workflow actions. This field has a maximum of 2048 characters. In this example, the condition specifies that the actions are performed if the Probability % field on the new opportunity is set to 90 or higher.</p> <p><b>Note:</b> You cannot specify a condition for a workflow rule that has the Scheduled Event trigger event. If the &lt;WorkflowRuleCondition&gt; element is populated when you insert or update a workflow rule that has the Scheduled Event trigger event, then the element is ignored.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:WorkflowRuleCondition&gt;[{Primary Revenue Win Probability}]&gt;=LookupValue ("PROB", "90") &lt;/data:WorkflowRuleCondition&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;CancelSave&gt; is applicable only for workflow rules that have the Before Modified Record Saved trigger event. It specifies whether the Cancel Save processing is performed (true) if the condition on the workflow rule is not met, or is not performed (false). The Workflow Cancel Save privilege is required to insert or update a workflow rule set that contains the &lt;CancelSave&gt; element.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:CancelSave&gt;&gt;false&lt;/data:CancelSave&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;Order&gt; is the order number for the workflow rule. It determines the order in which Oracle CRM On Demand invokes a sequence of workflow rules that are based on the same record type and the same trigger event, and if applicable, on the same parent record type.</p> <p><b>Note:</b> The &lt;Order&gt; element is read-only for workflow rules that have the Scheduled Event trigger event. Workflow rules that have the Scheduled Event trigger event are not performed as part of a sequence.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:Order&gt;1&lt;/data:Order&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;DisplayMessage&gt; is applicable only for workflow rules that have the Before Modified Record Saved trigger event. It specifies the message that is returned to the user or Web service if the condition on the rule is not met, and &lt;CancelSave&gt; is set to true for the rule. This field has a maximum of 1999 characters.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:DisplayMessage&gt;&lt;/data:DisplayMessage&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;Description&gt; contains additional information about the workflow rule.</p>	<pre>&lt;data:WorkflowRule&gt; . . .</pre>



Description	Element or Section
	<pre>&lt;data:Description&gt;Workflow Rule for new opportunities with probability at 90% or higher&lt;/data:Description&gt; &lt;/data:WorkflowRule&gt;</pre>
<p>The &lt;ListOfWorkflowTranslations&gt; section is applicable only for workflow rules that have the Before Modified Record Saved trigger event. It contains the translation values for the workflow Cancel Save message.</p>	<pre>&lt;data:ListOfWorkflowTranslations&gt; . . . &lt;/data:ListOfWorkflowTranslations&gt;</pre>
<p>The &lt;WorkflowTranslation&gt; section is applicable only for workflow rules that have the Before Modified Record Saved trigger event. It contains the translation values of the workflow Cancel Save message for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter language code for a language. For the list of language codes, see <i>Language Codes and Their Corresponding Language and Country</i>.</li> <li>• &lt;DisplayMessageTranslation&gt; contains the message in the language identified by the language code.</li> </ul>	<pre>&lt;data:ListOfWorkflowTranslations&gt; &lt;data:WorkflowTranslation&gt; &lt;data:LanguageCode&gt;ENU &lt;/data:LanguageCode&gt; &lt;data:DisplayMessageTranslation&gt;This Record can not be updated, since workflow Cancel Save (Acc_WF_2 ) is in Active status. &lt;/data:DisplayMessageTranslation&gt; &lt;/data:WorkflowTranslation&gt; &lt;data:WorkflowTranslation&gt; &lt;data:LanguageCode&gt;ENG &lt;/data:LanguageCode&gt; &lt;data:DisplayMessageTranslation&gt;This Record can not be updated. &lt;/data:DisplayMessageTranslation&gt; &lt;/data:WorkflowTranslation&gt; . . . &lt;/data:ListOfWorkflowTranslations&gt;</pre>

The following table describes the elements that are applicable only for workflow rules that have the Scheduled Event trigger event.

Description	Element or Section
<p>&lt;StartDateTime&gt; specifies the date and time when the first instance of the scheduled event is to be executed.</p> <p><b>Note:</b> If the scheduled event already exists and is active in the target environment, then &lt;StartDateTime&gt; is read-only.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:StartDateTime&gt;05/10/2018 12:00:00 &lt;/data:StartDateTime&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;EndDateTime&gt; specifies the date and time after which no further instances of the scheduled event are to be executed.</p> <p>If the &lt;NumOccurrence&gt; and &lt;EndDateTime&gt; elements both contain a value when you update or insert a scheduled event, then only the value in the</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:EndDateTime&gt;07/10/2018 12:00:00 &lt;/data:EndDateTime&gt; . . . &lt;/data:WorkflowRule&gt;</pre>

Description	Element or Section
<p>&lt;EndTime&gt; element is written to the scheduled event.</p> <p><b>Note:</b> If the scheduled event already exists and is active in the target environment, then &lt;EndTime&gt; is read-only.</p>	
<p>&lt;RecurrenceType&gt; corresponds to the Recurring field in the UI. It specifies the interval at which the scheduled event is to repeat. Valid values are Hourly, Daily, Weekly, Monthly, and Yearly.</p> <p><b>Note:</b> If the scheduled event already exists and is active in the target environment, then &lt;RecurrenceType&gt; is read-only.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:RecurrenceType&gt;Monthly &lt;/data:RecurrenceType&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;RecurrencePeriod&gt; corresponds to the Every field in the UI. It specifies the interval period for the recurring instances of the scheduled event. Only positive integers are valid and the minimum allowed value is 1.</p> <p><b>Note:</b> If the scheduled event already exists and is active in the target environment, then &lt;RecurrencePeriod&gt; is read-only.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:RecurrencePeriod&gt;1 &lt;/data:RecurrencePeriod&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>If the &lt;RecurrenceType&gt; element is set to Monthly, then the &lt;LastDayOfMonth&gt; element specifies whether each instance of the scheduled event is to be executed on the last day of any month in which it is executed (true), or on the day of the month specified in the &lt;StartDateTime&gt; element (false).</p> <p>The &lt;LastDayOfMonth&gt; element is not applicable if the &lt;RecurrenceType&gt; element is set to anything other than Monthly.</p> <p><b>Note:</b> If the scheduled event already exists and is active in the target environment, then &lt;LastDayOfMonth&gt; is read-only.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data&gt;LastDayOfMonth&gt;true &lt;/data&gt;LastDayOfMonth&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;NumOccurrence&gt; corresponds to the After field in the UI. It specifies the number of times that the scheduled event is to be executed.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:NumOccurrence/&gt; . . .</pre>

Description	Element or Section
<p>The &lt;EndDateTime&gt; element takes precedence over the &lt;NumOccurrence&gt; element. If both of these elements contain a value when you update or insert a scheduled event, then only the value in the &lt;EndDateTime&gt; element is written to the scheduled event.</p> <p><b>Note:</b> If the scheduled event already exists and is active in the target environment, then &lt;NumOccurrence&gt; is read-only.</p>	<pre>&lt;/data:WorkflowRule&gt;</pre>
<p>&lt;ListName&gt; specifies the filtered list that returns the records on which the workflow actions act.</p> <p>If the user who activated the scheduled event has access to more than one list with the same name as the list specified on the scheduled event, then the most personalized list with that name is used. For example, if the user has a private list with a given name and also has access to a role-specific list with the same name, then the private list is used when the instance of the scheduled event is executed.</p> <p><b>Note:</b> If the scheduled event already exists and is active in the target environment, then &lt;ListName&gt; is read-only.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:ListName&gt;All Top Accounts &lt;/data:ListName&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;ScheduledInstancesInitiatedByUser&gt; corresponds to the Initiated By field in the UI. This element is read-only.</p> <p><b>Note:</b> Up to the time that a scheduled event is made active, the Initiated By field on the scheduled event record shows the name of the user who created the scheduled event. After the event is made active, the Initiated By field is updated to show the name of the user who made the event active.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:ScheduledInstancesInitiatedByUser&gt; 1QA2-HQOHK &lt;/data:ScheduledInstancesInitiatedByUser&gt; . . . &lt;/data:WorkflowRule&gt;</pre>
<p>&lt;ScheduledEventStatus&gt; specifies the current status of the scheduled event. This element is read-only. The valid values are:</p> <ul style="list-style-type: none"> <li><b>Not Scheduled.</b> The scheduled event is not active and there is no pending instance of the event.</li> </ul>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:ScheduledEventStatus/&gt; . . . &lt;/data:WorkflowRule&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• <b>Scheduled.</b> The scheduled event is active and a pending instance of the event exists.</li> <li>• <b>Completed.</b> All of the scheduled occurrences of the scheduled event have completed.</li> <li>• <b>Terminated.</b> The most recently generated instance of the scheduled event was deleted from the Workflow Wait Monitor, or the scheduled event has been deactivated.</li> </ul>	
<p>&lt;EnableNotification&gt; specifies whether Oracle CRM On Demand is to send an email notification to the user who activated the scheduled event when any of the following happens:</p> <ul style="list-style-type: none"> <li>• An instance of the scheduled event completes successfully.</li> <li>• An instance of the scheduled event fails.</li> <li>• An instance of the scheduled event is deleted from the Workflow Wait Monitor.</li> </ul> <p>If this element is set to true, then an email notification is sent. If this element is set to false, then an email notification is not sent.</p>	<pre>&lt;data:WorkflowRule&gt; . . . &lt;data:EnableNotification&gt;&gt;false &lt;/data:EnableNotification&gt; . . . &lt;/data:WorkflowRule&gt;</pre>

## Elements and Sections in the Workflow Action Sets Output File

The following topics describe the elements and sections for various workflow action sets:

- [Assign a Book Workflow Action Set](#)
- [Send Email Workflow Action Set](#)
- [Create Task Workflow Action Set](#)
- [Wait Action Workflow Action Set](#)
- [Field Update Workflow Action Set](#)
- [Create Integration Event Workflow Action Set](#)
- [Submit Call Workflow Action Set](#)
- [Submit Workflow Action Set](#)

# Assign a Book Workflow Action Set

The following table describes the elements and sections in the Assign a Book workflow action set XML output file.

Description	Element or Section
<p>&lt;WorkflowName&gt; contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>	<pre>&lt;data:WorkflowName&gt;Opportunity Rule &lt;/data:WorkflowName&gt;</pre>
<p>The &lt;WorkflowAction&gt; section contains the details of the workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Name&gt; is the name of the workflow action.</p>	<pre>&lt;data:WorkflowAction&gt;   &lt;data:Name&gt;BookAssignTest&lt;/data:Name&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Active&gt; specifies whether the workflow action is active (true) or inactive (false).</p>	<pre>&lt;data:WorkflowAction&gt; . . .   &lt;data:Active&gt;&gt;true&lt;/data:Active&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Order&gt; is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.</p>	<pre>&lt;data:WorkflowAction&gt; . . .   &lt;data:Order&gt;1&lt;/data:Order&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>The &lt;WorkflowAssignBookAction&gt; section contains the details of the Assign a Book workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; . . .   &lt;data:WorkflowAssignBookAction&gt; . . .   &lt;/data:WorkflowAssignBookAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>If the &lt;AssignmentOption&gt; element value is anything other than Remove all, then either the &lt;BookName&gt; element or the &lt;BookExpr&gt; element is required, to specify the target book. The <i>target book</i> is the book that is to be assigned to records, or removed from records, by the workflow action. The target book is specified as follows:</p> <ul style="list-style-type: none"> <li>• &lt;BookName&gt; optionally specifies the name of the target book.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . .   &lt;data:WorkflowAssignBookAction&gt;     &lt;data:BookName&gt;MyBook&lt;/data:BookName&gt;     &lt;data:BookExpr/&gt; . . .   &lt;/data:WorkflowAssignBookAction&gt; &lt;/data:WorkflowAction&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>&lt;BookExpr&gt; optionally contains an expression that evaluates to the name of a book.</li> </ul> <p><b>Note:</b> If the &lt;BookName&gt; and &lt;BookExpr&gt; elements both contain a value in an input file for an <b>Upsert</b> or <b>InsertOrUpdate</b> command, then only the value of the &lt;BookName&gt; element is saved in Oracle CRM On Demand.</p>	
<p>&lt;AssignmentOption&gt; specifies the type of book assignment. The valid values are as follows:</p> <ul style="list-style-type: none"> <li><b>Add.</b> This option assigns the target book to all records.</li> <li><b>Replace.</b> This option assigns the target book to all records and removes any previously assigned books that have the same type as the target book.</li> <li><b>Replace All.</b> This option assigns the target book to all records and removes all previously assigned books, regardless of type.</li> <li><b>Replace Only.</b> This option specifies that a currently assigned book is to be replaced by the target book. If the &lt;AssignmentOption&gt; element value is Replace Only, then the &lt;ReplaceBookName&gt; element or the &lt;ReplaceBookExpr&gt; element specifies the book that is to be replaced.</li> <li><b>Remove.</b> This option removes the existing assignment to the target book from all records.</li> <li><b>Remove All.</b> This option removes all assigned books from the records.</li> </ul>	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowAssignBookAction&gt; . . . &lt;data:AssignmentOption&gt;Replace Only &lt;/data:AssignmentOption&gt; . . . &lt;/data:WorkflowAssignBookAction&gt; &lt;/data:WorkflowAction&gt; </pre>
<p>If the &lt;AssignmentOption&gt; element value is Replace Only, then either the &lt;ReplaceBookName&gt; element or the &lt;ReplaceBookExpr&gt; element is required, to specify the book that is to be replaced. The elements are as follows:</p> <ul style="list-style-type: none"> <li>&lt;ReplaceBookName&gt; optionally contains the name of the book that is to be replaced.</li> <li>&lt;ReplaceBookExpr&gt; optionally contains an expression that evaluates to the name of the book that is to be replaced.</li> </ul>	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowAssignBookAction&gt; . . . &lt;data:ReplaceBookName&gt;NewBook &lt;/data:ReplaceBookName&gt; &lt;data:ReplaceBookExpr/&gt; . . . &lt;/data:WorkflowAssignBookAction&gt; &lt;/data:WorkflowAction&gt; </pre>

Description	Element or Section
<p><b>Note:</b> If the &lt;ReplaceBookName&gt; and &lt;ReplaceBookExpr&gt; elements both contain a value in an input file for an <b>Upsert</b> or <b>InsertOrUpdate</b> command, then only the value of the &lt;ReplaceBookName&gt; element is saved in Oracle CRM On Demand.</p>	
<p>&lt;ApplyTo&gt; specifies the cases in which the new book assignment will be made. The &lt;ApplyTo&gt; element is required if the &lt;AssignmentOption&gt; element value is anything other than Add. The valid values are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Manual.</b> The book assignment will be made only in cases where the previous book assignment was made manually.</li> <li>• <b>Auto.</b> The book assignment will be made only in cases where the previous book assignment was made through workflow or a batch assignment.</li> <li>• <b>Both.</b> The new book assignment will be made in all cases.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowAssignBookAction&gt; . . . &lt;data:ApplyTo&gt;Both&lt;/data:ApplyTo&gt; &lt;/data:WorkflowAssignBookAction&gt; &lt;/data:WorkflowAction&gt;</pre>

## Send Email Workflow Action Set

The following table describes the elements and sections in the Send Email workflow action set XML output file.

Description	Element or Section
<p>&lt;WorkflowName&gt; contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>	<pre>&lt;data:WorkflowName&gt;Opportunity Approval &lt;/data:WorkflowName&gt;</pre>
<p>The &lt;WorkflowAction&gt; section contains the details of the workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Name&gt; is the name of the workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; &lt;data:Name&gt;SendEmailTest&lt;/data:Name&gt; . . . &lt;/data:WorkflowAction&gt;</pre>

Description	Element or Section
<p>&lt;Active&gt; specifies whether the workflow action is active (true) or inactive (false).</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:Active&gt;&gt;true&lt;/data:Active&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Order&gt; is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:Order&gt;2&lt;/data:Order&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>The &lt;WorkflowSendEmailAction&gt; section contains the details of the Send Email workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;FromType&gt; corresponds to the From field in the user interface (UI). It indicates the source of the From email address. The valid values are:</p> <ul style="list-style-type: none"> <li>• <b>FROM_EMAIL_ADDRESS.</b> This value corresponds to the Current User option in the UI.</li> <li>• <b>FROM_DEFAULT.</b> This value corresponds to the Default Email Address option in the UI.</li> <li>• <b>SPECIFIC_EMAIL_ADDRESS.</b> This value corresponds to the Specific Email Address option in the UI.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:FromType&gt;FROM_EMAIL_ADDRESS &lt;/data:FromType&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;From&gt; contains the From email address when &lt;FromType&gt; is set to SPECIFIC_EMAIL_ADDRESS.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:From&gt;&lt;/data:From&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;ReplyToType&gt; corresponds to the Reply To field in the user interface (UI). It indicates the source of the email address that automatically appears in the To field when an email recipient replies to the email. The valid values are:</p> <ul style="list-style-type: none"> <li>• <b>CURRENT_USER_ADDRESS.</b> This value corresponds to the Current User option in the UI.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:ReplyToType&gt;CURRENT_USER_ADDRESS &lt;/data:ReplyToType&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>



Description	Element or Section
<ul style="list-style-type: none"> <li><b>SPECIFIC_EMAIL_ADDRESS.</b> This value corresponds to the Specific Email Address option in the UI.</li> </ul> <p>If this field is left empty, then the From address in the email appears in the To field in the email response.</p>	
<p>&lt;ReplyTo&gt; contains the email reply address when &lt;ReplyToType&gt; is set to SPECIFIC_EMAIL_ADDRESS.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:ReplyTo&gt;&lt;/data:ReplyTo&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;ToType&gt; corresponds to the To field in the UI. It indicates the type of the To email address. The valid values are:</p> <ul style="list-style-type: none"> <li><b>R.</b> Corresponds to the Relative User on Record option in the UI.</li> <li><b>U.</b> Corresponds to the Specific User option in the UI.</li> <li><b>E.</b> Corresponds to the Specific Email Address option in the UI.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:ToType&gt;R&lt;/data:ToType&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;To&gt; specifies the recipient for the email. The value of this element depends on the value in the &lt;ToType&gt; element, as follows:</p> <ul style="list-style-type: none"> <li>If &lt;ToType&gt; is set to U (Specific User), then the &lt;To&gt; element contains the User ID of the user.</li> <li>If &lt;ToType&gt; is set to R (Relative User on Record), then the value of the &lt;To&gt; element is defined, see <i>System Names and Display Names for Owner and To Element Values for Relative User on Record</i>.</li> <li>If &lt;ToType&gt; is set to E (Specific Email Address), then the &lt;To&gt; element contains the expression defined for specific email addresses.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:To&gt;O_Primary Owner Id&lt;/data:To&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Subject&gt; contains the subject line for the email.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:Subject&gt;New Opportunity&lt;/data:Subject&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>

Description	Element or Section
<p>&lt;EmailFormat&gt; specifies the format for the email message, which can be Plain Text or HTML.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:EmailFormat&gt;HTML&lt;/data:EmailFormat&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;MessageBody&gt; contains the content of the email message. For information about the HTML elements that are supported for use in workflow email messages, see <i>Oracle CRM On Demand Online Help</i>.</p> <p><b>Note:</b> When updating or inserting a workflow action with an email message in HTML format, the left angle bracket (&lt;) at the start of each HTML tag must be encoded as &amp;lt;. At the end of the HTML tag, the right angle bracket (&gt;) can be used, or it can be encoded as &amp;gt;. When you extract a workflow action that has an email message in HTML format, Oracle CRM On Demand automatically encodes the left angle brackets in the extracted email message.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:MessageBody&gt;A new &amp;lt;b&gt;high potential&lt;/b&gt; opportunity has been created.&lt;/data:MessageBody&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>For workflow rules where &lt;RecordType&gt; contains <b>Analytics</b> and &lt;TriggerEvent&gt; contains <b>ScheduledEvent</b> only.</p> <p>&lt;ContentType&gt; specifies the type of Analytics object to execute. Possible values are Analysis, Dashboard, and Dashboard Page. For more information about creating scheduled events for the Analytics record type and configuring one or more Send Email actions on the event, see <i>Oracle CRM On Demand Online Help</i>.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:ContentType&gt;Analysis &lt;/data:ContentType&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>For workflow rules where &lt;RecordType&gt; contains <b>Analytics</b> and &lt;TriggerEvent&gt; contains <b>ScheduledEvent</b> only.</p> <p>&lt;ContentFormat&gt; specifies the type of output to generate. Possible values depend on the value of &lt;ContentType&gt; as follows:</p> <ul style="list-style-type: none"> <li>• <b>Analysis.</b> CSV, MHTML, PDF, and XLSX.</li> <li>• <b>Dashboard.</b> XLSX.</li> <li>• <b>Dashboard Page.</b> PDF and XLSX.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:ContentFormat&gt;PDF &lt;/data:ContentFormat&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>

Description	Element or Section
<p>For workflow rules where &lt;RecordType&gt; contains <b>Analytics</b>, the &lt;TriggerEvent&gt; contains <b>ScheduledEvent</b>, and &lt;ContentType&gt; for the Send Email action contains <b>Analysis</b> only.</p> <p>&lt;SendEmailIfNoResults&gt; specifies whether an email is to be sent (Y) or not to be sent (N) to a user if the analysis returns no results for that user.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:SendEmailIfNoResults&gt;Y&lt;/data:SendEmailIfNoResults&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>For workflow rules where &lt;RecordType&gt; contains <b>Analytics</b> and &lt;TriggerEvent&gt; contains <b>ScheduledEvent</b> only.</p> <p>&lt;ContentPath&gt; specifies the path for the Analytics object.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:ContentPath&gt;Content Path 2 &lt;/data:ContentPath&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>For workflow rules where &lt;RecordType&gt; contains <b>Analytics</b> and &lt;TriggerEvent&gt; contains <b>ScheduledEvent</b> only.</p> <p>&lt;Parameters&gt; specifies any parameters that are to be applied at runtime. If any filter parameters are present, then the syntax of those parameters is validated when you insert or update the workflow action. For information about specifying parameters, see <i>Oracle CRM On Demand Online Help</i>.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:Parameters&gt; P0=1&amp;P1=like&amp;P2="Account". "Account ID" &amp;P3=ACME%25 &lt;/data:Parameters&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>The &lt;ListOfWorkflowEmailTranslations&gt; section contains the translation values for the email subject and message.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:ListOfWorkflowEmailTranslations&gt; . . . &lt;/data:ListOfWorkflowEmailTranslations&gt; . . . &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>The &lt;WorkflowEmailTranslation&gt; section contains the translation values for the email subject and message, for one language:</p> <ul style="list-style-type: none"> <li>&lt;LanguageCode&gt; contains the three-letter language code for a language. For the list of language codes, see <i>Language Codes and Their Corresponding Language and Country</i>.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowSendEmailAction&gt; . . . &lt;data:ListOfWorkflowEmailTranslations&gt; &lt;data:WorkflowEmailTranslation&gt; &lt;data:LanguageCode&gt;ENU &lt;/data:LanguageCode&gt; &lt;data:SubjectTranslation&gt; New Opportunity &lt;/data:SubjectTranslation&gt; &lt;data:MessageBodyTranslation&gt; A new &lt;b&gt;high potential&lt;/b&gt; opportunity has been created.</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>&lt;SubjectTranslation&gt; contains the email subject line in the language identified by the language code.</li> <li>&lt;MessageBodyTranslation&gt; contains the email message body text in the language identified by the language code.</li> </ul>	<pre> &lt;/data:MessageBodyTranslation&gt; &lt;/data:WorkflowEmailTranslation&gt; . . . &lt;/data:ListOfWorkflowEmailTranslations&gt; &lt;/data:WorkflowSendEmailAction&gt; &lt;/data:WorkflowAction&gt;                     </pre>

## Create Task Workflow Action Set

The following table describes the elements and sections in the Create Task workflow action set XML output file.

Description	Element or Section
<p>&lt;WorkflowName&gt; contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>	<pre> &lt;data:WorkflowName&gt;Opportunity Approval &lt;/data:WorkflowName&gt;                     </pre>
<p>The &lt;WorkflowAction&gt; section contains the details of the workflow action.</p>	<pre> &lt;data:WorkflowAction&gt; . . . &lt;/data:WorkflowAction&gt;                     </pre>
<p>&lt;Name&gt; is the name of the workflow action.</p>	<pre> &lt;data:WorkflowAction&gt;   &lt;data:Name&gt;CreateTaskTest&lt;/data:Name&gt; . . . &lt;/data:WorkflowAction&gt;                     </pre>
<p>&lt;Active&gt; specifies whether the workflow action is active (true) or is inactive (false).</p>	<pre> &lt;data:WorkflowAction&gt; . . .   &lt;data:Active&gt;&gt;false&lt;/data:Active&gt; . . . &lt;/data:WorkflowAction&gt;                     </pre>
<p>&lt;Order&gt; is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.</p>	<pre> &lt;data:WorkflowAction&gt; . . .   &lt;data:Order&gt;3&lt;/data:Order&gt; . . . &lt;/data:WorkflowAction&gt;                     </pre>
<p>The &lt;WorkflowCreateTaskAction&gt; section contains the details of the Create Task workflow action.</p>	<pre> &lt;data:WorkflowAction&gt; . . .   &lt;data:WorkflowCreateTaskAction&gt; . . .   &lt;/data:WorkflowCreateTaskAction&gt; &lt;/data:WorkflowAction&gt;                     </pre>

Description	Element or Section
<p>&lt;Owner&gt; specifies the owner for the task. The &lt;Owner&gt; element's value depends on the &lt;OwnerType&gt; element, as follows:</p> <ul style="list-style-type: none"> <li>If &lt;OwnerType&gt; is set to U (Specific User), then the &lt;Owner&gt; element contains the name of the user.</li> <li>If the &lt;OwnerType&gt; element is set to R (Relative User On Record), then the value of the &lt;Owner&gt; element is defined, see <i>System Names and Display Names for Owner and To Element Values for Relative User on Record</i>.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateTaskAction&gt; &lt;data:Owner&gt;O_Primary Owner Id &lt;/data:Owner&gt; . . . &lt;/data:WorkflowCreateTaskAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;OwnerType&gt; corresponds to the Owner field in the user interface. The valid values are:</p> <ul style="list-style-type: none"> <li><b>R.</b> Corresponds to the Relative User On Record option in the user interface.</li> <li><b>U.</b> Corresponds to the Specific User option in the user interface.</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateTaskAction&gt; . . . &lt;data:OwnerType&gt;R&lt;/data:OwnerType&gt; . . . &lt;/data:WorkflowCreateTaskAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Type&gt; is the activity type.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateTaskAction&gt; . . . &lt;data:Type&gt;Approval&lt;/data:Type&gt; . . . &lt;/data:WorkflowCreateTaskAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;SubType&gt; is the activity subtype.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateTaskAction&gt; . . . &lt;data:SubType&gt;Callback&lt;/data:SubType&gt; . . . &lt;/data:WorkflowCreateTaskAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;DueDate&gt; contains an expression that evaluates to the due date for the task.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateTaskAction&gt; . . . &lt;data:DueDate&gt;Today ()+2&lt;/data:DueDate&gt; . . . &lt;/data:WorkflowCreateTaskAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Priority&gt; specifies the priority of the task.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateTaskAction&gt; . . . &lt;data:Priority&gt;2-Medium&lt;/data:Priority&gt;</pre>

Description	Element or Section
	<pre>                     . . .                 &lt;/data:WorkflowCreateTaskAction&gt;             &lt;/data:WorkflowAction&gt;         </pre>
<Status> specifies the status of the task.	<pre>             &lt;data:WorkflowAction&gt;             . . .             &lt;data:WorkflowCreateTaskAction&gt;             . . .             &lt;data:Status&gt;Not Started&lt;/data:Status&gt;             . . .             &lt;/data:WorkflowCreateTaskAction&gt;         &lt;/data:WorkflowAction&gt;         </pre>
<TaskCurrency> contains the three-character currency code for the task.	<pre>             &lt;data:WorkflowAction&gt;             . . .             &lt;data:WorkflowCreateTaskAction&gt;             . . .             &lt;data:TaskCurrency&gt;CAD             &lt;/data:TaskCurrency&gt;             . . .             &lt;/data:WorkflowCreateTaskAction&gt;         &lt;/data:WorkflowAction&gt;         </pre>
<Private> specifies whether the task is visible only to the task user (true), or is visible to users other than the task user (false).	<pre>             &lt;data:WorkflowAction&gt;             . . .             &lt;data:WorkflowCreateTaskAction&gt;             . . .             &lt;data:Private&gt;&gt;false&lt;/data:Private&gt;             . . .             &lt;/data:WorkflowCreateTaskAction&gt;         &lt;/data:WorkflowAction&gt;         </pre>
<Subject> contains the subject line for the task.	<pre>             &lt;data:WorkflowAction&gt;             . . .             &lt;data:WorkflowCreateTaskAction&gt;             . . .             &lt;/data:Subject&gt;             . . .             &lt;/data:WorkflowCreateTaskAction&gt;         &lt;/data:WorkflowAction&gt;         </pre>
<Description> contains the description of the task.	<pre>             &lt;data:WorkflowAction&gt;             . . .             &lt;data:WorkflowCreateTaskAction&gt;             . . .             &lt;data:Description&gt;&lt;/data:Description&gt;             &lt;/data:WorkflowCreateTaskAction&gt;         &lt;/data:WorkflowAction&gt;         </pre>

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

The following table shows the system names and corresponding display names for the values that can appear in the following elements:

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

**Note:** The T\_Team Role values are available for the Account, Contact, Lead, Opportunity, and Service Request record types only.

System Name in the XML File	Display Name
C_	Service Request Created By
MA_Account Id	Account Owner's Manager
M_Owned By Id	<i>Object</i> Owner's Manager
M_Owner Id	Lead Owner's Manager
M_Primary HH Owner Id	Household Owner's Manager
M_Primary Owner Id	<i>Object</i> Owner's Manager
M_Sales Rep Id	Salesperson's Manager
OA_Account Id	Account Owner
O_Owned By Id	Service Request Owner
O_Owner Id	Lead Owner
O_Primary HH Owner Id	Household Owner
O_Primary Owner Id	<i>Object</i> Owner

System Name in the XML File	Display Name
O_Sales Rep Id	Salesperson
T_Team Role_Consultant	Object Team - Consultant
T_Team Role_Executive Sponsor	Object Team - Executive Sponsor
T_Team Role_Other	Object Team - Other
T_Team Role_Owner	Object Team - Owner
T_Team Role_Partner	Object Team - Partner

**Note:** For the Account, Contact, Lead, Opportunity, and Service Request record types, any custom roles that are added to the record type can be used in the Relative User on Record element, in addition to the values shown in the previous table. The system name for a custom team role is in the format T\_Team Role\_ *teamrolename*, where *teamrolename* is the name given to the team role.

## Wait Action Workflow Action Set

The following table describes the elements and sections in the Wait workflow action set XML output file.

Description	Element or Section
<WorkflowName> contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.	<code>&lt;data:WorkflowName&gt;Opportunity Approval&lt;/data:WorkflowName&gt;</code>
The <WorkflowAction> section contains the details of the workflow action.	<code>&lt;data:WorkflowAction&gt; . . .&lt;/data:WorkflowAction&gt;</code>
<Name> is the name of the workflow action.	<code>&lt;data:WorkflowAction&gt;   &lt;data:Name&gt;WaitTest&lt;/data:Name&gt; . . .&lt;/data:WorkflowAction&gt;</code>



Description	Element or Section
<p>&lt;Active&gt; specifies whether the workflow action is active (true) or inactive (false).</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:Active&gt;true&lt;/data:Active&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Order&gt; is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:Order&gt;4&lt;/data:Order&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>The &lt;WorkflowWaitAction&gt; section contains the details of the Wait workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowWaitAction&gt; . . . &lt;/data:WorkflowWaitAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;ReevaluateRuleConditionsAfterWait&gt; determines whether the workflow rule condition is to be reevaluated when the waiting period ends (true) or the workflow rule condition is not to be reevaluated (false).</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowWaitAction&gt; &lt;data:ReevaluateRuleConditionsAfterWait&gt; true &lt;/data:ReevaluateRuleConditionsAfterWait&gt; . . . &lt;/data:WorkflowWaitAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;WaitType&gt; specifies the type of wait period selected in the user interface. The values that are valid are:</p> <ul style="list-style-type: none"> <li>• Period</li> <li>• Period Expression</li> <li>• Date Time</li> <li>• Date Time Expression</li> </ul>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowWaitAction&gt; . . . &lt;data:WaitType&gt;Period&lt;/data:WaitType&gt; . . . &lt;/data:WorkflowWaitAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;DateTime&gt; specifies the date and time the wait period will end, if the &lt;WaitType&gt; value is Date Time.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowWaitAction&gt; . . . &lt;data:DateTime&gt;&lt;/data:DateTime&gt; . . . &lt;/data:WorkflowWaitAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;WaitExpression&gt; contains an expression that specifies the wait period, if the &lt;WaitType&gt; value is Period Expression or Date Time Expression. If the &lt;WaitType&gt; value is Period, then &lt;WaitExpression&gt; indicates the period as PYMDTHM. For example:</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowWaitAction&gt; . . . &lt;data:WaitExpression&gt;PYM10DTHM &lt;/data:WaitExpression&gt; &lt;/data:WorkflowWaitAction&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• PYM10DTHM indicates 10 days.</li> <li>• P1Y3MDTHM indicates 1 year and 3 months.</li> <li>• PYMDT5H15M indicates 5 hours and 15 minutes.</li> </ul>	<pre>&lt;/data:WorkflowAction&gt;</pre>

## Field Update Workflow Action Set

The following table describes the elements and sections in the Field Update workflow action set XML output file.

Description	Element or Section
<p>&lt;WorkflowName&gt; contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>	<pre>&lt;data:WorkflowName&gt;Opportunity Approval &lt;/data:WorkflowName&gt;</pre>
<p>The &lt;WorkflowAction&gt; section contains the details of the workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Name&gt; is the name of the workflow action.</p>	<pre>&lt;data:WorkflowAction&gt;   &lt;data:Name&gt;UpdateFieldTest&lt;/data:Name&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Active&gt; specifies whether the workflow action is active (true) or inactive (false).</p>	<pre>&lt;data:WorkflowAction&gt; . . .   &lt;data:Active&gt;&gt;true&lt;/data:Active&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;Order&gt; is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.</p> <p><b>Note:</b> A Field Update Workflow action must be preceded by at least one Wait action.</p>	<pre>&lt;data:WorkflowAction&gt; . . .   &lt;data:Order&gt;5&lt;/data:Order&gt; . . . &lt;/data:WorkflowAction&gt;</pre>
<p>The &lt;WorkflowFieldUpdateAction&gt; section contains the details of the Update Values workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; . . .   &lt;data:WorkflowFieldUpdateAction&gt; . . .</pre>

Description	Element or Section
	<pre> &lt;/data:WorkflowFieldUpdateAction&gt; &lt;/data:WorkflowAction&gt; </pre>
<FieldName> is the system name of the field.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowFieldUpdateAction&gt; &lt;data:FieldName&gt;Total Asset Value &lt;/data:FieldName&gt; . . . &lt;/data:WorkflowFieldUpdateAction&gt; &lt;/data:WorkflowAction&gt; </pre>
<Value> is the new value for the field.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowFieldUpdateAction&gt; . . . &lt;data:Value&gt;10000&lt;/data:Value&gt; . . . &lt;/data:WorkflowFieldUpdateAction&gt; &lt;/data:WorkflowAction&gt; </pre>
<OverwriteExistingValues> specifies whether the existing value in the field (if the field has an existing value) is to be overwritten with the new value (true) or is not to be overwritten (false). If the field is empty, the field is updated with the new value, even if <OverwriteExistingValues> is set to false.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowFieldUpdateAction&gt; . . . &lt;data:OverwriteExistingValues&gt;&gt;true &lt;/data:OverwriteExistingValues&gt; &lt;/data:WorkflowFieldUpdateAction&gt; &lt;/data:WorkflowAction&gt; </pre>

## Create Integration Event Workflow Action Set

The following table describes the elements and sections in the Create Integration Event workflow action set XML output file.

Description	Element or Section
<WorkflowName> contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.	<pre> &lt;data:WorkflowName&gt;Opportunity Approval &lt;/data:WorkflowName&gt; </pre>
The <WorkflowAction> section contains the details of the workflow action.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;/data:WorkflowAction&gt; </pre>
<Name> is the name of the workflow action.	<pre> &lt;data:WorkflowAction&gt; &lt;data:Name&gt;EventQueue&lt;/data:Name&gt; . . . </pre>

Description	Element or Section
	<code>&lt;/data:WorkflowAction&gt;</code>
<Active> specifies whether the workflow action is active (true) or inactive (false).	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:Active&gt;&gt;true&lt;/data:Active&gt; . . . &lt;/data:WorkflowAction&gt;                     </pre>
<Order> is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:Order&gt;6&lt;/data:Order&gt; . . . &lt;/data:WorkflowAction&gt;                     </pre>
The <WorkflowCreateIntegrationEvent> section contains the details of the Create Integration Event workflow action.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateIntegrationEventAction&gt; . . . &lt;/data:WorkflowCreateIntegrationEventAction&gt; &lt;/data:WorkflowAction&gt;                     </pre>
The <ListOfQueues> section specifies the queues to which the integration events are to be written. <QueueName> contains the name of a queue.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateIntegrationEventAction&gt; &lt;data:ListOfQueues&gt; &lt;data:QueueName&gt;Default Queue &lt;/data:QueueName&gt; . . . &lt;/data:ListOfQueues&gt; . . . &lt;/data:WorkflowCreateIntegrationEventAction&gt; &lt;/data:WorkflowAction&gt;                     </pre>
The <ListOfFields> section specifies the fields that are tracked by the Create Integration Event workflow action.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateIntegrationEventAction&gt; . . . &lt;data:ListOfFields&gt; . . . &lt;/data:ListOfFields&gt; &lt;/data:WorkflowCreateIntegrationEventAction&gt; &lt;/data:WorkflowAction&gt;                     </pre>
<FieldName> contains the system name of the field.	<pre> &lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateIntegrationEventAction&gt; . . . &lt;data:ListOfFields&gt; &lt;data:FieldName&gt;Currency Code &lt;/data:FieldName&gt; . . . &lt;/data:ListOfFields&gt; . . . &lt;/data:WorkflowCreateIntegrationEventAction&gt; &lt;/data:WorkflowAction&gt;                     </pre>

Description	Element or Section
<p>&lt;AlwaysInclude&gt; specifies whether the field is included in the integration event, even if the value of the field has not been changed (true) or if the field is included in the integration event only when the value of the field is changed (false).</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateIntegrationEventAction&gt; . . . &lt;data:ListOfFields&gt; &lt;data:AlwaysInclude&gt;true &lt;/data:AlwaysInclude&gt; . . . &lt;/data:ListOfFields&gt; &lt;/data:WorkflowCreateIntegrationEventAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;TrackChanges&gt; specifies whether an integration event is generated each time the field is updated (true). The workflow action creates an integration event only if &lt;TrackChanges&gt; is set to true for at least one field, and if a change is detected in at least one of the fields for which &lt;TrackChanges&gt; is set to true.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateIntegrationEventAction&gt; . . . &lt;data:ListOfFields&gt; . . . &lt;data:TrackChanges&gt;true &lt;/data:TrackChanges&gt; &lt;/data:ListOfFields&gt; &lt;/data:WorkflowCreateIntegrationEventAction&gt; &lt;/data:WorkflowAction&gt;</pre>
<p>&lt;SchemaVersion&gt; specifies the Web service schema version that is to be used for the integration events. Web Services v2.0 is the default value.</p>	<pre>&lt;data:WorkflowAction&gt; . . . &lt;data:WorkflowCreateIntegrationEventAction&gt; . . . &lt;data:SchemaVersion&gt;Web Services v2.0 &lt;/data:SchemaVersion&gt; &lt;/data:WorkflowCreateIntegrationEventAction&gt; &lt;/data:WorkflowAction&gt;</pre>

## Submit Call Workflow Action Set

The following table describes the elements and sections in the Submit Call workflow action set XML output file.

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

Description	Element or Section
<p>&lt;WorkflowName&gt; contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.</p>	<pre>&lt;data:WorkflowName&gt;Activity Insert &lt;/data:WorkflowName&gt;</pre>
<p>The &lt;WorkflowAction&gt; section contains the details of the workflow action.</p>	<pre>&lt;data:WorkflowAction&gt; . . .</pre>

Description	Element or Section
	<code>&lt;/data:WorkflowAction&gt;</code>
<code>&lt;Name&gt;</code> is the name of the workflow action.	<code>&lt;data:WorkflowAction&gt;</code> <code>&lt;data:Name&gt;Auto Call Submit&lt;/data:Name&gt;</code> . . . <code>&lt;/data:WorkflowAction&gt;</code>
<code>&lt;Active&gt;</code> specifies whether the workflow action is active (true) or inactive (false).	<code>&lt;data:WorkflowAction&gt;</code> . . . <code>&lt;data:Active&gt;&gt;true&lt;/data:Active&gt;</code> . . . <code>&lt;/data:WorkflowAction&gt;</code>
<code>&lt;Order&gt;</code> is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.	<code>&lt;data:WorkflowAction&gt;</code> . . . <code>&lt;data:Order&gt;1&lt;/data:Order&gt;</code> . . . <code>&lt;/data:WorkflowAction&gt;</code>
The <code>&lt;WorkflowSubmitCallAction&gt;</code> section contains no data. For more information about the Submit Call action and how you can use it, see <i>Oracle CRM On Demand Disconnected Mobile Sales Administration Guide</i> , which is available from the Oracle CRM On Demand documentation library in Oracle Help Center.	<code>&lt;data:WorkflowAction&gt;</code> . . . <code>&lt;data:WorkflowSubmitCallAction/&gt;</code> <code>&lt;/data:WorkflowAction&gt;</code>

## Submit Workflow Action Set

The following table describes the elements and sections in the Submit workflow action set XML output file.

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

Description	Element or Section
<code>&lt;WorkflowName&gt;</code> contains the name of the workflow rule with which this action is associated. When performing an Upsert or InsertOrUpdate operation for workflow actions, this name is used to find a matching workflow rule.	<code>&lt;data:WorkflowName&gt;MyTestSubmitTrans</code> <code>&lt;/data:WorkflowName&gt;</code>
The <code>&lt;WorkflowAction&gt;</code> section contains the details of the workflow action.	<code>&lt;data:WorkflowAction&gt;</code> . . . <code>&lt;/data:WorkflowAction&gt;</code>

Description	Element or Section
<Name> is the name of the workflow action.	<pre>&lt;data:WorkflowAction&gt;   &lt;data:Name&gt;AutoTransSubmit&lt;/data:Name&gt;   . . . &lt;/data:WorkflowAction&gt;</pre>
<Active> specifies whether the workflow action is active (true) or inactive (false).	<pre>&lt;data:WorkflowAction&gt;   . . .   &lt;data:Active&gt;&gt;true&lt;/data:Active&gt;   . . . &lt;/data:WorkflowAction&gt;</pre>
<Order> is the order number for the workflow action within the set of actions on the workflow rule. It determines the order in which Oracle CRM On Demand invokes the sequence of workflow actions on the workflow rule.	<pre>&lt;data:WorkflowAction&gt;   . . .   &lt;data:Order&gt;1&lt;/data:Order&gt;   . . . &lt;/data:WorkflowAction&gt;</pre>
The <WorkflowSubmitTransactionAction> section contains no data. For more information about using the Submit action for submitting sample transactions, see <i>Oracle CRM On Demand Online Help</i> .	<pre>&lt;data:WorkflowAction&gt;   . . .   &lt;data:WorkflowSubmitTransactionAction/&gt; &lt;/data:WorkflowAction&gt;</pre>

## Elements and Sections in the Workflow User Sets Output File

The following table describes the elements and sections in the workflow user sets XML file.

Description	Element or Section
<WorkflowName> specifies the name of the workflow rule. This field has a maximum of 50 characters.	<pre>&lt;data:WorkflowUserSet&gt;   &lt;data:WorkflowName&gt;Opportunity Rule   &lt;/data:WorkflowName&gt;   . . . &lt;/data:WorkflowUserSet&gt;</pre>
The <ListOfWorkflowUsers> section contains the workflow user set for the workflow.	<pre>&lt;data:WorkflowUserSet&gt;   . . .   &lt;data:ListOfWorkflowUsers&gt;   . . .   &lt;/data:ListOfWorkflowUsers&gt; &lt;/data:WorkflowUserSet&gt;</pre>
The <WorkflowUser> section contains the data for a user in the following elements:	<pre>&lt;data:WorkflowUserSet&gt;   . . .   &lt;data:ListOfWorkflowUsers&gt;   &lt;data:WorkflowUser&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li><b>UserLastName.</b> The user's last name.</li> </ul>	<code>&lt;data:UserLastName&gt;Lee&lt;/data:UserLastName&gt;</code>
<ul style="list-style-type: none"> <li><b>UserFirstName.</b> The user's first name.</li> </ul>	<code>&lt;data:UserFirstName&gt;Joey&lt;/data:UserFirstName&gt;</code>
<ul style="list-style-type: none"> <li><b>UserFullName.</b> The user's full name.</li> </ul>	<code>&lt;data:UserFullName&gt;Joey Lee&lt;/data:UserFullName&gt;</code>
<ul style="list-style-type: none"> <li><b>UserEmail.</b> The user's email address.</li> </ul>	<code>&lt;data:UserEmail&gt;Jolee@test.com&lt;/data:UserEmail&gt;</code>
<ul style="list-style-type: none"> <li><b>UserAlias.</b> The user alias of the user.</li> </ul>	<code>&lt;data:UserAlias&gt;Jolee&lt;/data:UserAlias&gt;</code>
<ul style="list-style-type: none"> <li><b>UserId.</b> The user's ID.</li> </ul>	<code>&lt;data:UserId&gt;IQA2-13BMET&lt;/data:UserId&gt;</code>
<ul style="list-style-type: none"> <li><b>UserExternalSystemId.</b> The external system ID of the user.</li> </ul>	<code>&lt;data:UserExternalSystemId&gt;Jli&lt;/data:UserExternalSystemId&gt;</code>
<ul style="list-style-type: none"> <li><b>UserLoginName.</b> The login name for the user.</li> </ul>	<code>&lt;data:UserLoginName&gt;JLICORP/ADMIN&lt;/data:UserLoginName&gt;</code>
	<code>&lt;data:WorkflowUser&gt;</code>
	<code>. . .</code>
	<code>&lt;/data:ListOfWorkflowUsers&gt;</code>
	<code>&lt;/data:WorkflowUserSet&gt;</code>

## Migrating Workflow Rules

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

- [Extracting a Workflow Rule or a Workflow Rule Set](#)
- [Extracting All Workflow Rule Sets](#)
- [Updating or Inserting Workflow Rules \(Upsert\)](#)
- [Updating or Inserting Workflow Rules \(InsertOrUpdate\)](#)
- [Deleting a Workflow Rule Set](#)

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

## Extracting a Workflow Rule or a Workflow Rule Set

This topic describes how to extract a single workflow rule or a workflow rule set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to the `<TriggerEvent>.xml` file in the following directory:

- If the `ParentRecordType` parameter has an empty value, then the output from the extract is saved to the following directory:

```
.../repository/WorkflowRuleSet/RecordType
```

- If the `ParentRecordType` parameter does not have an empty value, then the output from the extract is saved to the following directory:

```
.../repository/WorkflowRuleSet/RecordType/ParentRecordType
```



If the workflow rule set has multiple parent record types, then only the relative order changes.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a workflow rule set:

```
migrationtool -u UserID -s ServerURL Read WorkflowRuleSet RecordType TriggerEvent [ParentRecordType]  
[WorkflowName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *RecordType* is the system name of the Oracle CRM On Demand record type (object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *TriggerEvent* is the language-independent code (LIC) for the event type, see the table in *Language-Independent Codes for Trigger Events*.
- *ParentRecordType* is the system name of the Oracle CRM On Demand parent record type (object). If the string contains spaces, then it must be enclosed with quotation marks.
- *WorkflowName* is the name of the Oracle CRM On Demand rule. You can read an individual workflow rule by specifying a value for the <WorkflowName> parameter.

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

## Example of Extracting a Single Workflow Rule

The following is an example of extracting a specific workflow rule:

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

**Note:** If the workflow rule name contains spaces, then it must be enclosed with quotation marks.

## Example of Extracting a Workflow Rule Set

The following is an example of extracting the entire sequence of workflow rules based on the Account record type and the Before Modified Record Saved trigger event:

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

## Extracting All Workflow Rule Sets

This topic describes how to extract all workflow rule sets from your Oracle CRM On Demand environment; that is, a customer test environment or production environment. The output from the extract is saved to the *TriggerEvent.xml* file in the following directory:

- If the *ParentRecordType* parameter has an empty value, then the output is saved to the following directory:

```
.../repository/WorkflowRuleSet/RecordType
```

- If the *ParentRecordType* parameter does not have an empty value, then the output is saved to the following directory:

```
.../repository/WorkflowRuleSet/RecordType/ParentRecordType
```

The number of records returned is not limited for the `ReadAll` command. If the workflow rule set has multiple parent record types, then only the relative order changes. You must correct this error by using the workflow functionality of Oracle CRM On Demand.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all workflow rule sets:

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

where:

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

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

### Example of Extracting All Workflow Rule Sets

The following is an example of extracting all workflow rule sets from your Oracle CRM On Demand server:

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

## Updating or Inserting Workflow Rules (Upsert)

This topic describes how to use the `Upsert` command to update workflow rules (if they exist) or insert workflow rules (if they do not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

## About the Upsert Operation

When you run the `Upsert` command, the existing workflow rules are updated, new workflow rules are inserted, and rules that are not in the request are deleted. The order of the rules in the workflow request must match the order of the rules for the workflow result in the Oracle CRM On Demand application. The changes following the Upsert operation are applied completely or not at all.

For more information about the considerations that apply to Upsert operations, see *Considerations That Apply to Upsert Operations*.

## Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert WorkflowRuleSet WorkflowRulesXML
```

where:

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

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

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

## Example of Updating or Inserting Workflow Rules

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

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

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

## Updating or Inserting Workflow Rules (InsertOrUpdate)

This topic describes how to use the `InsertOrUpdate` command to update workflow rules (if they exist) or insert workflow rules (if they do not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *InsertOrUpdate operation*.

## About the InsertOrUpdate Operation

The `InsertOrUpdate` command updates workflow rules based on the following user keys:

1. `<RecordType>` and `<TriggerEvent>` and `<Order>`
2. `<WorkflowName>`

If Oracle CRM On Demand locates a workflow rule based on the user keys, then the workflow rule is updated.

If Oracle CRM On Demand cannot locate any workflow rule based on the user keys, then a new workflow rule is created.

Unlike the Upsert operation, the `InsertOrUpdate` operation does not delete any existing workflow rules that are not identified in the input XML file.

The changes following the `InsertOrUpdate` operation are applied completely or not at all.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update workflow rules (if they exist) and insert new workflow rules (if they do not exist):

```
migrationtool -u UserID -s ServerURL InsertOrUpdate WorkflowRuleSet WorkflowRulesXML
```

where:

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

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

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

## Deleting a Workflow Rule Set

This topic describes how to delete a workflow rule set based on the specified record type and trigger event. The set of workflow rules is deleted from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

**Note:** The Delete operation can delete any existing workflow rule set even if the authenticated user does not have access to the object.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to delete a workflow rule set:

```
migrationtool -u UserID -s ServerURL Delete WorkflowRuleSet RecordType TriggerEvent [ParentRecordType]  
[WorkflowName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *RecordType* is the system name of the Oracle CRM On Demand record type (object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *TriggerEvent* is the language-independent code (LIC) for the event type, see [Language-Independent Codes for Trigger Events](#).
- *ParentRecordType* is the system name of the Oracle CRM On Demand parent record type (object). If the string contains spaces, then it must be enclosed with quotation marks.
- *WorkflowName* is the name of the Oracle CRM On Demand workflow rule. You can delete an individual workflow rule by specifying a value for the *WorkflowName* parameter.

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

## Example of Deleting a Workflow Rule Set

The following is an example of deleting the entire sequence of workflow rules based on the Account record type and the Before Modified Record Saved trigger event:

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

## Migrating Workflow Action Sets

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with workflow actions and workflow action sets:

- [Extracting a Workflow Action or a Workflow Action Set](#)
- [Extracting Workflow Action Sets That Are Related to a Workflow Rule Set](#)
- [Updating or Inserting a Workflow Action Set \(Upsert\)](#)
- [Updating or Inserting Workflow Actions \(InsertOrUpdate\)](#)

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

## Extracting a Workflow Action or a Workflow Action Set

This topic describes how to extract a single workflow action or a single workflow action set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
.../repository/WorkflowActionSet/WorkflowRuleName.xml
```

Authenticated users can extract a specific workflow action or workflow action set. The Read operation can read any existing action set even if the authenticated user does not have access to the object or trigger event for the specified workflow.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific workflow action or workflow action set:

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

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *WorkflowRuleName* is the name of a workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *WorkflowActionName* is the name of a workflow action. If the string contains spaces, then it must be enclosed with quotation marks.
- *ActiveFlag* is an optional argument that you can use to filter the workflow actions that are exported, based on the value of the Active check box on the workflow actions. The valid values are true (the Active check box is selected) and false (the Active check box is not selected).

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

## Example of Extracting a Single Workflow Action

The following is an example of extracting a specific workflow action:

```
migrationtool -u UserID -s ServerURL Read WorkflowActionSet MyWorkflowRule MyWorkflowAction
```

**Note:** If the workflow rule name contains spaces, then it must be enclosed with quotation marks. Similarly, if the workflow action name contains spaces, then it must be enclosed with quotation marks.

## Example of Extracting a Single Workflow Action Set

The following is an example of extracting the action set for a specific workflow rule:

```
migrationtool -u UserID -s ServerURL Read WorkflowActionSet MyWorkflowRule
```

**Note:** If the workflow rule name contains spaces, then it must be enclosed with quotation marks.

## Example of Extracting Active Workflow Actions in a Single Workflow Action Set

The following is an example of extracting only the workflow actions that are active in a specific workflow rule:

```
migrationtool -u UserID -s ServerURL Read WorkflowActionSet MyWorkflowRule "" true
```

**Note:** If the workflow rule name contains spaces, then it must be enclosed with quotation marks.

## Extracting Workflow Action Sets That Are Related to a Workflow Rule Set

This topic describes how to extract all action sets that are related to a rule set from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

One WorkflowActionSet.xml file is extracted for each action set identified by the input record type, trigger event, and parent record type. The output for each action set matches the data that is extracted if a specific Read operation is used to retrieve the action set.

The output WorkflowActionSet.xml file is saved to the following directory:

- If the *ParentRecordType* parameter has an empty value, then the output is saved to the following directory:

```
.../repository/WorkflowActionSet/RecordType/TriggerEvent.xml
```

- If the *ParentRecordType* parameter does not have an empty value, then the output is saved to the following directory:

```
.../repository/WorkflowActionSet/RecordType/ParentRecordType/TriggerEvent.xml
```

Authenticated users can extract a specific workflow action set. The Read operation can read any existing action set even if the authenticated user does not have access to the object or trigger event for the specified workflow.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract workflow action sets that are related to a workflow rule set:

```
migrationtool -u UserID -s ServerURL ReadForRuleSet WorkflowActionSet RecordType TriggerEvent  
[ParentRecordType]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *RecordType* is the system name of the Oracle CRM On Demand record type (object) for the workflow rule. If the string contains spaces, then it must be enclosed with quotation marks.
- *TriggerEvent* is the language-independent code (LIC) for the event type, see [Language-Independent Codes for Trigger Events](#).
- *ParentRecordType* is the system name of the Oracle CRM On Demand parent record type (object). If the string contains spaces, then it must be enclosed with quotation marks.

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

## Example of Extracting Workflow Action Sets That Are Related to a Workflow Rule Set

The following is an example of extracting workflow action sets that are related to a workflow rule set, when a new Account record is saved:

```
migrationtool -u UserID -s ServerURL ReadForRuleSet WorkflowActionSet Account WriteRecordNew
```

## Updating or Inserting a Workflow Action Set (Upsert)

This topic describes how to use the `Upsert` command to update a workflow action set (if it exists) or insert a workflow action set (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

Running an Upsert operation on a workflow action set is a synchronization operation. At the end of the operation, the workflow action set matches the action set in the XML file, where possible. Existing workflow actions are updated, new actions are inserted, and actions that are not in the request are deleted. The order of the actions in the workflow request matches the order of the actions in the action set XML file. The updates to workflow action sets in an Upsert operation are applied completely or not at all.

### Syntax

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

```
migrationtool -u UserID -s ServerURL Upsert WorkflowActionSet WorkflowActionSetXML
```

where:

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

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

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

## Example of Updating or Inserting a Workflow Action Set

The following is an example of updating a workflow action set (if it exists) or inserting a workflow action set (if it does not exist) in your Oracle CRM On Demand server:



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

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

## Updating or Inserting Workflow Actions (InsertOrUpdate)

This topic describes how to use the `InsertOrUpdate` command to update workflow actions (if they exist) and insert workflow actions (if they do not exist) on your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *InsertOrUpdate operation*. Unlike the Upsert operation, the InsertOrUpdate operation does not delete any existing workflow actions that are not included in the input XML file.

The `InsertOrUpdate` command updates workflow actions based on the following user keys:

1. `<WorkflowName>`
2. `<Order>`

If you want to update an existing action on a workflow rule, then all of the following conditions must be met:

- The workflow rule named in the input XML file must exist.
- The value in the `<Order>` element of the workflow action in the input XML file must match the order number of the existing action within the workflow rule in the Oracle CRM On Demand application.
- The action type of the workflow action in the input XML file must be the same as the action type of the existing workflow action in the Oracle CRM On Demand application.

**Note:** You cannot use an InsertOrUpdate operation to change the action type of an existing workflow action.

### About the InsertOrUpdate Operation

When you run the `InsertOrUpdate` command, the following happens:

- If Oracle CRM On Demand locates a matching workflow action based on the user keys, then the workflow action is updated.
- If Oracle CRM On Demand locates the workflow rule based on the `<WorkflowName>` user key, but cannot locate a matching workflow action based on the `<Order>` user key, then a new workflow action is created on the specified workflow rule. The next unused order number for actions on the workflow rule is assigned to the new action. For example, if there are already two actions on the workflow rule, then the new action is assigned order number 3.
- If Oracle CRM On Demand locates the workflow rule based on the `<WorkflowName>` user key, and locates a matching workflow action based on the `<Order>` user key, but the action type of the action in the input XML file is different from the action type of the corresponding action in Oracle CRM On Demand, then the action is not updated.
- Existing workflow actions that are not included in the XML request are not affected. The InsertOrUpdate operation does not delete any existing workflow actions that are not included in the input XML file.
- The changes following the InsertOrUpdate operation are applied completely or not at all.

## Syntax

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

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

where:

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

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

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

## Example of Updating or Inserting Workflow Actions

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

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

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

## Migrating Workflow User Sets

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with workflow user sets:

- [Extracting Workflow User Sets](#)
- [Updating or Inserting Workflow User Sets \(InsertOrUpdate\)](#)
- [Deleting a Workflow User](#)

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

## Extracting Workflow User Sets

This topic describes how to extract the workflow user sets from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a directory as follows:

```
.../repository/WorkflowUserSet/WorkflowRuleName.xml
```

Authenticated users can extract workflow user sets. The `ReadForRuleSet` operation can read any existing user set even if the authenticated user does not have access to the Analytics object or `ScheduledEvent` trigger event for the specified workflow.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract workflow user sets:

```
migrationtool -u UserID -s ServerURL ReadForRuleSet WorkflowUserSet RecordType TriggerEvent  
[ParentRecordType]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *RecordType* is Analytics.
- *TriggerEvent* is `ScheduledEvent` the language-independent code (LIC) for the event type of scheduled event, see [Language-Independent Codes for Trigger Events](#).
- *ParentRecordType* is the system name of the Oracle CRM On Demand parent record type (object). If the string contains spaces, then it must be enclosed with quotation marks.

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

### Example of Extracting Workflow User Sets

The following is an example of extracting the workflow user sets:

```
migrationtool -u UserID -s ServerURL ReadForRuleSet WorkflowUserSet Analytics ScheduledEvent
```

## Updating or Inserting Workflow User Sets (InsertOrUpdate)

This topic describes how to use the `InsertOrUpdate` command to update a workflow user set (if it exists) and insert a workflow user set (if it does not exist) on your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *InsertOrUpdate operation*.

## About the InsertOrUpdate Operation

To insert users you specify the workflow name with unique values for the <UserID> or <UserLoginName> child elements of <WorkflowUser>. If some of the specified user data results in an error, for example, if a value for a user is not unique, the whole request is rolled back.

When you run the `InsertOrUpdate` command, the following happens:

- If Oracle CRM On Demand locates a matching workflow user based on the user keys, then the workflow user is updated.
- Existing workflow users that are not included in the XML request are not affected. The `InsertOrUpdate` operation does not delete any existing workflow users that are not included in the input XML file.
- The changes following the `InsertOrUpdate` operation are applied completely or not at all.

## Syntax

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

```
migrationtool -u UserID -s ServerURL InsertOrUpdate WorkflowUserSet WorkflowUsersXML
```

where:

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

```
C:\My Files\My WorkflowUserSet1.xml
```

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

## Example of Updating or Inserting a Workflow User Set

The following is an example of updating a workflow user set (if it exists) or inserting a workflow user set (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL InsertOrUpdate WorkflowUserSet "C:\My Files\My WorkflowUserSet.xml"
```

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

## Deleting a Workflow User

This topic describes how to delete a workflow user. The workflow user is deleted from your Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

**Note:** The Delete operation can delete any existing workflow user even if the authenticated user does not have access to the object.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to delete a workflow user:

```
migrationtool -u UserID -s ServerURL Delete WorkflowUserSet WorkflowName UserID UserLoginName
```

where:

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

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

## Example of Deleting a Workflow User

The following is an example of deleting a workflow user.

```
migrationtool -u UserID -s ServerURL Delete WorkflowUserSet AnalyticsWF3 "" "JELICORP/JOEYLI1"
```



# 24 Migrating Assignment Rule Groups and Assignment Rules

## Migrating Assignment Rule Groups and Assignment Rules

This chapter describes how to migrate assignment rule groups and assignment rules using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- *Assignment Manager*
- *Assignment Rule Groups*
- *Assignment Rules*
- *Privileges Required for Migrating Assignment Rule Groups and Assignment Rules*
- *Elements and Sections in the Assignment Rule Groups Output File*
- *Elements and Sections in the Assignment Rules Output File*
- *Migrating Assignment Rule Groups*
- *Migrating Assignment Rules*

## Assignment Manager

You can configure the assignment manager in Oracle CRM On Demand to automatically assign leads, opportunities, service requests, or accounts to the appropriate person, team, or territory, based on the criteria that you configure on the assignment rules and the order in which the rules are evaluated within the assignment rule groups. Assignment rules and rule groups are supported only for the Account, Lead, Opportunity, and Service Request record types. For more information about assignment rules and rule groups, see *Oracle CRM On Demand Online Help*.

## Assignment Rule Groups

An *assignment rule group* is a set of assignment rules for a specific record type, that are evaluated according to the order specified on the rules within the group. You can create multiple assignment rule groups for a record type, but only one assignment rule group can be active for a record type at any time.

The following table describes the Oracle Migration Tool On Demand client commands that are used with assignment rule groups. The commands are case sensitive. For examples of running these commands, see *Migrating Assignment Rule Groups*.

Command	Description
<code>Read AssignmentRuleGroup</code> [ <i>SystemNameOfObject</i> ] [ <i>RuleGroupName</i> ]	This command extracts all of the assignment rule groups for a specific record type (object), or a single assignment rule group (if the <i>RuleGroupName</i> parameter is specified). The parameters for the command are as follows: <ul style="list-style-type: none"> <li><i>SystemNameOfObject</i> is the system name of a record type (object). The system names for the record types are listed in <i>System Names for Record Types</i>. If you specify a rule group name in the command, then you do not need to specify a record type, but you must include an empty value for the <i>SystemNameOfObject</i> parameter. An empty value is specified as a set of double quotation marks ("").</li> <li><i>RuleGroupName</i> is name of a specific rule group. You can extract an individual assignment rule group by specifying a value for the <i>RuleGroupName</i> parameter.</li> </ul>
<code>ReadAll AssignmentRuleGroup</code>	This command extracts all assignment rule groups, for all record types.
<code>Upsert AssignmentRuleGroup</code> <i>AssignmentRuleGroupXML</i>	This command inserts an assignment rule group (if it does not already exist) or updates an assignment rule group (if it already exists).

## Assignment Rules

An *assignment rule* automatically assigns a lead, opportunity, service request, or account to the appropriate person, team, or territory, based on the criteria that you configure on the assignment rule. The following table describes the Oracle Migration Tool On Demand client commands that are used with assignment rules. The commands are case sensitive. For examples of running these commands, see *Migrating Assignment Rules*.

Command	Description
<code>Read AssignmentRule</code> [ <i>SystemNameOfObject</i> ] [ <i>RuleGroupName</i> ] [ <i>RuleName</i> ]	This command extracts all of the assignment rules for a specific record type (object), or all of the rules within a rule group, or a single assignment rule, depending on the parameters you specify. You must specify at least one of the following parameters: <ul style="list-style-type: none"> <li><i>SystemNameOfObject</i> is the system name of the record type (object). The system names for the record types are listed in <i>System Names for Record Types</i>. If you specify a rule group name or a rule name with the command, then you do not need to specify a record type, but you must provide an empty value for the <i>SystemNameOfObject</i> parameter. An empty value is specified as a set of double quotation marks ("").</li> <li><i>RuleGroupName</i> is the name of an assignment rule group to which a rule belongs. If you specify the rule name, then you do not need to specify the rule group name, but you must provide an empty value for the <i>RuleGroupName</i> parameter.</li> <li><i>RuleName</i> is the name of a rule. You can extract an individual assignment rule by specifying a value for the <i>RuleName</i> parameter.</li> </ul>
<code>ReadAll AssignmentRule</code>	This command extracts all assignment rules in all assignment rule groups, for all record types.
<code>Upsert AssignmentRule</code> <i>AssignmentRuleXML</i>	This command inserts an assignment rule (if it does not already exist) or updates an assignment rule (if it already exists).



## Privileges Required for Migrating Assignment Rule Groups and Assignment Rules

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

- For the `Read` and `ReadAll` commands: Enable Web Services Access, and Data Rules and Assignment.
- For the `Upsert` command: Enable Web Services Access, and Data Rules and Assignment.

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

## Elements and Sections in the Assignment Rule Groups Output File

The following table describes the elements and sections in the assignment rule groups XML output file.

Description	Element or Section
The <AssignmentRuleGroup> section contains all of the information for a single assignment rule group.	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<RecordType> contains the system name of the record type (object), which never changes.	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:RecordType&gt;Service Request &lt;/data:RecordType&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<RuleGroupName> contains the name of the assignment rule group.	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:RuleGroupName&gt;SRTestGroup &lt;/data:RuleGroupName&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<Active> specifies whether this assignment rule group is active (true) or inactive (false).	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:Active&gt;&gt;false&lt;/data:Active&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<UnassignedOwner> contains the User Sign In ID of the user who inherits the records that are not assigned by one of	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:UnassignedOwner&gt; EXAPMLECOMPANY/TESTUSER</pre>

Description	Element or Section
<p>the rules in the rule group. This element is required.</p>	<pre>&lt;/data:UnassignedOwner&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<p>&lt;UnassignedTerritory&gt; is the territory that inherits the records that are not assigned by one of the rules.</p> <p>The &lt;UnassignedTerritory&gt; element is applicable for assignment rule groups for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rule groups for other record types.</p>	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:UnassignedTerritory/&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<p>&lt;ReturnEmail&gt; is the email address that appears in the Sender field in the email notifications that are sent to the owners of leads and service requests when the records are assigned to them by the assignment manager. Also, if the record owner replies to the email, then the To address in the return email is set to this email address.</p> <p>The &lt;ReturnEmail&gt; element is applicable for assignment rule groups for the Lead and Service Request record types only. This element is ignored for upsert requests for assignment rule groups for other record types.</p> <p><b>Note:</b> You can optionally turn off the email notification for individual assignment rules for the Service Request record type, by setting the &lt;EmailNotification&gt; element on the rule to false. You cannot turn off the email notification for assignment rules for the Lead record type.</p>	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:ReturnEmail&gt;test.sender@example.com &lt;/data:ReturnEmail/&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<p>The &lt;ListOfRule&gt; section contains details of the rules for the rule group.</p>	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:ListOfRule&gt; . . . &lt;/data:ListOfRule&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<p>The &lt;AssignmentRule&gt; section contains all of the top-level details for one rule in the rule group.</p>	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:ListOfRule&gt; &lt;data:AssignmentRule&gt; . . . &lt;/data:AssignmentRule&gt;</pre>

Description	Element or Section
<p><b>Note:</b> The team assignment and criteria information for a rule is not contained in the assignment rule group XML file. The team assignment and criteria information for a rule is contained in the assignment rule XML file only.</p>	<pre>         . . .       &lt;/data:ListOfRule&gt;       . . .     &lt;/data:AssignmentRuleGroup&gt;           </pre>
<p>&lt;RuleName&gt; contains the name of the rule.</p>	<pre>     &lt;data:AssignmentRuleGroup&gt;       . . .       &lt;data:ListOfRule&gt;         &lt;data:AssignmentRule&gt;           &lt;data:RuleName&gt;SRRule1&lt;/data:RuleName&gt;           . . .         &lt;/data:AssignmentRule&gt;         . . .       &lt;/data:ListOfRule&gt;     &lt;/data:AssignmentRuleGroup&gt;           </pre>
<p>&lt;Order&gt; is the order number for the assignment rule within the rule group. It determines the order in which the assignment manager invokes a sequence of assignment rules. The rule numbered 1 is invoked first, followed by the rule numbered 2, and so on.</p>	<pre>     &lt;data:AssignmentRuleGroup&gt;       . . .       &lt;data:ListOfRule&gt;         &lt;data:AssignmentRule&gt;           . . .           &lt;data:Order&gt;1&lt;/data:Order&gt;           . . .         &lt;/data:AssignmentRule&gt;         . . .       &lt;/data:ListOfRule&gt;     &lt;/data:AssignmentRuleGroup&gt;           </pre>
<p>&lt;AssignTo&gt; contains the User Sign In ID of the user to whom the record is assigned if the criteria on the rule are met. When the criteria on one rule are met, the record is assigned and subsequent rules are ignored.</p>	<pre>     &lt;data:AssignmentRuleGroup&gt;       . . .       &lt;data:ListOfRule&gt;         &lt;data:AssignmentRule&gt;           . . .           &lt;data:AssignTo&gt;EXAMPLECOMPANY/TESTUSER2           &lt;/data:AssignTo&gt;           . . .         &lt;/data:AssignmentRule&gt;         . . .       &lt;/data:ListOfRule&gt;     &lt;/data:AssignmentRuleGroup&gt;           </pre>
<p>The &lt;EmailNotification&gt; element specifies whether an email notification is sent to the user to whom the record is assigned (true) or an email notification is not sent to the user (false). The default value is true.</p> <p>The &lt;EmailNotification&gt; element can be set to false for assignment rules for the Service Request record type only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre>     &lt;data:AssignmentRuleGroup&gt;       . . .       &lt;data:ListOfRule&gt;         &lt;data:AssignmentRule&gt;           . . .           &lt;data:EmailNotification&gt;&gt;true           &lt;/data:EmailNotification&gt;           . . .         &lt;/data:AssignmentRule&gt;         . . .       &lt;/data:ListOfRule&gt;       . . .     &lt;/data:AssignmentRuleGroup&gt;           </pre>

Description	Element or Section
<p><b>Note:</b> You cannot turn off the email notification for assignment rules for the Lead record type. No email notifications are sent for account and opportunity assignments, even if the &lt;EmailNotification&gt; element is set to true.</p>	<pre>&lt;/data:AssignmentRuleGroup&gt;</pre>
<p>&lt;AssignToTerritory&gt; is the territory to which the record is assigned if the criteria on the rule are met.</p> <p>The &lt;AssignToTerritory&gt; element is applicable for assignment rules for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:ListOfRule&gt; &lt;data:AssignmentRule&gt; . . . &lt;data:AssignToTerritory/&gt; . . . &lt;/data:AssignmentRule&gt; . . . &lt;/data:ListOfRule&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<p>&lt;IncludeTeamAssignment&gt; specifies whether the team members are assigned to the record (true), or the team members are not assigned to the record (false).</p> <p>The &lt;IncludeTeamAssignment&gt; element can be set to true for assignment rules for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:ListOfRule&gt; &lt;data:AssignmentRule&gt; . . . &lt;data:IncludeTeamAssignment&gt;false &lt;/data:IncludeTeamAssignment&gt; . . . &lt;/data:AssignmentRule&gt; . . . &lt;/data:ListOfRule&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<p>&lt;IncludeRelatedContacts&gt; specifies whether the contacts that are linked to the account are assigned to the specified account owner and territory if the rule criteria are met (true), or the contacts that are linked to the account are not assigned to the specified account owner and territory (false). The default value is false.</p> <p>The &lt;IncludeRelatedContacts&gt; element can be set to true for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:ListOfRule&gt; &lt;data:AssignmentRule&gt; . . . &lt;data:IncludeRelatedContacts&gt;false &lt;/data:IncludeRelatedContacts&gt; . . . &lt;/data:AssignmentRule&gt; . . . &lt;/data:ListOfRule&gt; . . . &lt;/data:AssignmentRuleGroup&gt;</pre>
<p>&lt;IncludeRelatedOpportunities&gt; specifies whether the opportunities that are linked to the account are assigned to the specified account owner and territory if the rule criteria are met (true), or the opportunities that are linked to the account are not assigned to the specified</p>	<pre>&lt;data:AssignmentRuleGroup&gt; . . . &lt;data:ListOfRule&gt; &lt;data:AssignmentRule&gt; . . . &lt;data:IncludeRelatedOpportunities&gt;false &lt;/data:IncludeRelatedOpportunities&gt;</pre>

Description	Element or Section
<p>account owner and territory (false). The default value is false.</p> <p>The &lt;IncludeRelatedOpportunities&gt; element can be set to true for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre> &lt;/data:AssignmentRule&gt; . . . &lt;/data:ListOfRule&gt; . . . &lt;/data:AssignmentRuleGroup&gt;                     </pre>

## Elements and Sections in the Assignment Rules Output File

The following table describes the elements and sections in the assignment rules XML output file.

Description	Element or Section
<p>The &lt;AssignmentRule&gt; section contains all of the details of one assignment rule.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>
<p>&lt;RecordType&gt; contains the system name of the record type (object), which never changes.</p>	<pre> &lt;data:AssignmentRule&gt;   &lt;data:RecordType&gt;Account&lt;/data:RecordType&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>
<p>&lt;RuleGroupName&gt; contains the name of the assignment rule group to which this rule belongs.</p>	<pre> &lt;data:AssignmentRule&gt; . . .   &lt;data:RuleGroupName&gt;AcctTestGroup &lt;/data:RuleGroupName&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>
<p>&lt;RuleName&gt; contains the name of the rule.</p>	<pre> &lt;data:AssignmentRule&gt; . . .   &lt;data:RuleName&gt;AcctRule1&lt;/data:RuleName&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>
<p>&lt;Order&gt; is the order number for the assignment rule within the rule group. It determines the order in which the assignment manager invokes a sequence of assignment rules. The rule numbered 1 is invoked first, followed by the rule numbered 2, and so on.</p>	<pre> &lt;data:AssignmentRule&gt; . . .   &lt;data:Order&gt;1&lt;/data:Order&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>
<p>&lt;AssignTo&gt; contains the User Sign In ID of the user to whom the record is assigned if the criteria on the rule are met. When</p>	<pre> &lt;data:AssignmentRule&gt; . . .                     </pre>

Description	Element or Section
<p>the criteria on one rule are met, the record is assigned and subsequent rules are ignored.</p>	<pre>&lt;data:AssignTo&gt;EXAMPLECOMPANY/TESTUSER2 &lt;/data:AssignTo&gt; . . . &lt;/data:AssignmentRule&gt;</pre>
<p>The &lt;SendEmailNotification&gt; element specifies whether an email notification is sent to the user to whom the record is assigned (true) or an email notification is not sent to the user (false). The default value is true.</p> <p>The &lt;SendEmailNotification&gt; element can be set to false for assignment rules for the Service Request record type only. This element is ignored for upsert requests for assignment rules for other record types.</p> <p><b>Note:</b> You cannot turn off the email notification for assignment rules for the Lead record type. No email notifications are sent for account and opportunity assignments, even if the &lt;EmailNotification&gt; element is set to true</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:SendEmailNotification&gt;true &lt;/data:SendEmailNotification&gt; . . . &lt;/data:AssignmentRule&gt;</pre>
<p>&lt;AssignToTerritory&gt; is the territory to which the record is assigned if the criteria on the rule are met.</p> <p>The &lt;AssignToTerritory&gt; element is applicable for assignment rules in assignment rule groups for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:AssignToTerritory/&gt; . . . &lt;/data:AssignmentRule&gt;</pre>
<p>&lt;IncludeTeamAssignment&gt; specifies whether the team members are assigned to the record (true), or the team members are not assigned to the record (false).</p> <p>This element can be set to true for assignment rules in assignment rules for the Account and Opportunity record types only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:IncludeTeamAssignment&gt;true &lt;/data:IncludeTeamAssignment&gt; . . . &lt;/data:AssignmentRule&gt;</pre>
<p>&lt;IncludeRelatedContacts&gt; specifies whether the contacts that are linked to the account are assigned to the specified account owner and territory if the rule criteria are met (true), or the contacts that are linked to the account are not assigned to the specified account owner and territory (false). The default value is false.</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:IncludeRelatedContacts&gt;true &lt;/data:IncludeRelatedContacts&gt; . . . &lt;/data:AssignmentRule&gt;</pre>

Description	Element or Section
<p>The &lt;IncludeRelatedContacts&gt; can be set to true for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p>	
<p>&lt;IncludeRelatedOpportunities&gt; specifies whether the opportunities that are linked to an account are assigned to the specified account owner and territory if the rule criteria are met (true), or the opportunities that are linked to the account are not assigned to the specified account owner and territory (false). The default value is false.</p> <p>The &lt;IncludeRelatedOpportunities&gt; element can be set to true for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data:IncludeRelatedOpportunities&gt;true &lt;/data:IncludeRelatedOpportunities&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>
<p>The &lt;ListofTeam&gt; section contains details of the team members who share ownership of the assigned records.</p> <p>Team members can be added to assignment rules for the Account and Opportunity record types only. The &lt;ListofTeam&gt; section is ignored for upsert requests for assignment rules for other record types.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data&gt;ListofTeam&gt; . . . &lt;/data&gt;ListofTeam&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>
<p>The &lt;Team&gt; section contains details of one of the team members who share ownership of the assigned records.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data&gt;ListofTeam&gt; &lt;data:Team&gt; . . . &lt;/data:Team&gt; . . . &lt;/data&gt;ListofTeam&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>
<p>&lt;User&gt; contains the first and last name of the user.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data&gt;ListofTeam&gt; &lt;data:Team&gt; &lt;data&gt;User&gt;Test User&lt;/data&gt;User&gt; . . . &lt;/data:Team&gt; . . . &lt;/data&gt;ListofTeam&gt; . . . &lt;/data:AssignmentRule&gt;                     </pre>

Description	Element or Section
<p>&lt;Role&gt; contains the role of the team member. This element is read-only and is ignored for upsert requests.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data:ListofTeam&gt; &lt;data:Team&gt; . . . &lt;data:Role&gt;TestRole&lt;/data:Role&gt; . . . &lt;/data:Team&gt; . . . &lt;/data:ListofTeam&gt; . . . &lt;/data:AssignmentRule&gt; </pre>
<p>&lt;AccountAccess&gt; specifies the level of access that the user has to the account records that are assigned by this rule, and to the account records that are linked to the account. The &lt;AccountAccess&gt; element is applicable for assignment rules for the Account record type only. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data:ListofTeam&gt; &lt;data:Team&gt; . . . &lt;data:AccountAccess&gt;Edit &lt;/data:AccountAccess&gt; . . . &lt;/data:Team&gt; . . . &lt;/data:ListofTeam&gt; . . . &lt;/data:AssignmentRule&gt; </pre>
<p>&lt;ContactAccess&gt; specifies the level of access that the user has to the contact records that are linked to the account records that are assigned by this rule. The &lt;ContactAccess&gt; element is applicable for assignment rules for the Account record type only, and is applicable only if the &lt;IncludeRelatedContacts&gt; element is set to true for the rule. This element is ignored for upsert requests for assignment rules for other record types.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data:ListofTeam&gt; &lt;data:Team&gt; . . . &lt;data:ContactAccess&gt;Full &lt;/data:ContactAccess&gt; . . . &lt;/data:Team&gt; . . . &lt;/data:ListofTeam&gt; . . . &lt;/data:AssignmentRule&gt; </pre>
<p>&lt;OpportunityAccess&gt; specifies the level of access that the user has to the opportunity records that are assigned by this rule, and to the opportunity records that are linked to the opportunity. In addition, if the &lt;IncludeRelatedOpportunities&gt; element is set to true for the rule, then the &lt;OpportunityAccess&gt; element specifies the level of access that the user has to the opportunity records that are linked to the account records that are assigned by this rule.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data:ListofTeam&gt; &lt;data:Team&gt; . . . &lt;data:OpportunityAccess&gt;ReadOnly &lt;/data:OpportunityAccess&gt; &lt;/data:Team&gt; . . . &lt;/data:ListofTeam&gt; . . . &lt;/data:AssignmentRule&gt; </pre>
<p>The &lt;ListofRuleCriteria&gt; section contain details of the criteria for the assignment rule. You can specify multiple criteria for one rule.</p>	<pre> &lt;data:AssignmentRule&gt; . . . &lt;data:ListofRuleCriteria&gt; . . . &lt;/data:ListofRuleCriteria&gt; </pre>



Description	Element or Section
	<pre>&lt;/data:AssignmentRule&gt;</pre>
<p>The &lt;Rule&gt; section contains the details of one rule criterion.</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:ListOfRuleCriteria&gt; &lt;data:Rule&gt; . . . &lt;/data:Rule&gt; . . . &lt;/data:ListOfRuleCriteria&gt; &lt;/data:AssignmentRule&gt;</pre>
<p>&lt;Field&gt; contains the name of the field that is to be evaluated.</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:ListOfRuleCriteria&gt; &lt;data:Rule&gt; &lt;data:Field&gt;Account Type&lt;/data:Field&gt; . . . &lt;/data:Rule&gt; . . . &lt;/data:ListOfRuleCriteria&gt; &lt;/data:AssignmentRule&gt;</pre>
<p>&lt;Condition&gt; specifies the condition that must be satisfied to meet the criterion.</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:ListOfRuleCriteria&gt; &lt;data:Rule&gt; . . . &lt;data:Condition&gt;Contains all values &lt;/data:Condition&gt; . . . &lt;/data:Rule&gt; . . . &lt;/data:ListOfRuleCriteria&gt; &lt;/data:AssignmentRule&gt;</pre>
<p>&lt;Value&gt; contains the value for the criterion.</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:ListOfRuleCriteria&gt; &lt;data:Rule&gt; . . . &lt;data:Value&gt;Competitor&lt;/data:Value&gt; . . . &lt;/data:Rule&gt; . . . &lt;/data:ListOfRuleCriteria&gt; &lt;/data:AssignmentRule&gt;</pre>
<p>&lt;Sequence&gt; specifies the sequence of the criterion on the rule. This field is read-only and is ignored for upsert requests.</p>	<pre>&lt;data:AssignmentRule&gt; . . . &lt;data:ListOfRuleCriteria&gt; &lt;data:Rule&gt; . . . &lt;data:Sequence&gt;1000&lt;/data:Sequence&gt; &lt;/data:Rule&gt; . . . &lt;/data:ListOfRuleCriteria&gt; &lt;/data:AssignmentRule&gt;</pre>

# Migrating Assignment Rule Groups

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with assignment rule groups:

- [Extracting a Single Assignment Rule Group](#)
- [Extracting All Assignment Rule Groups for a Single Object](#)
- [Extracting All Assignment Rule Groups](#)
- [Updating or Inserting an Assignment Rule Group](#)

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

## Extracting a Single Assignment Rule Group

This topic describes how to extract a single assignment rule group from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
.../repository/AssignmentRuleGroup/RecordType/AssignmentRuleGroupName.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single assignment rule group:

```
migrationtool -u UserID -s ServerURL Read AssignmentRuleGroup [SystemNameOfObject] RuleGroupName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
  - *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
  - *SystemNameOfObject* is the system name of the object (record type) to which the assignment rule groups applies, for example, Account. The system names for the record types are listed in [System Names for Record Types](#). If you do not specify the record type, then you must specify an empty value for the *SystemNameOfObject* parameter. An empty value is specified as a set of double quotation marks ("").
- Note:** Assignment rule groups are supported only for the Account, Lead, Opportunity, and Service Request record types.
- *RuleGroupName* is the name of the rule group that you want to extract.

## Example of Extracting a Single Assignment Rule Group

The following is an example of extracting a single assignment rule group:

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

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the rule group name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rule Groups for a Single Object

This topic describes how to extract all assignment rule groups for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rule groups for a single object:

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

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rule groups applies, for example, Account. The system names for the record types are listed in *System Names for Record Types*.

**Note:** Assignment rule groups are supported only for the Account, Lead, Opportunity, and Service Request record types.

### Example of Extracting All Assignment Rule Groups for a Single Object

The following is an example of extracting all assignment rule groups for a single object:

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

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

## Extracting All Assignment Rule Groups

This topic describes how to extract all assignment rule groups from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rule groups:

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

where:

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

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

## Updating or Inserting an Assignment Rule Group

This topic describes how to use the `upsert` command to update an assignment rule group (if it exists) or insert an assignment rule group (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

### About the Upsert Operation

The `upsert` command inserts or updates an assignment rule group based on the user key: `<RecordType>` and `<RuleGroupName>`.

Oracle CRM On Demand attempts to locate the rule group based on the user key. If a match is located, then the rule group is updated. If Oracle CRM On Demand cannot locate a rule group based on the user key, then a new rule group is created.

For the rules specified in the input file for the assignment rule group (if any rules are specified), the `upsert` command inserts or updates the assignment rules based on either of the following user keys:

- **User key 1.** `<RuleGroupName>` and `<RecordType>` and `<RuleName>`.
- **User key 2.** `<RuleGroupName>` and `<RecordType>` and `<Order>`.

The `<RuleName>` and `<Order>` elements are child elements of the `<AssignmentRule>` element.

When you use the `upsert AssignmentRuleGroup` command to update an existing rule group, Oracle CRM On Demand attempts to locate the rules that are specified in the input file based on the user keys. If a match is located, then the rule is updated. If a match is located for both user keys, then the match located for user key 1 takes precedence. If Oracle CRM On Demand cannot locate an assignment rule based on the user keys, then a new rule is created.

When you run the `upsert` command, if the assignment rule group already exists, then the existing assignment rules in the rule group are updated, and new assignment rules for the rule group are inserted. Existing rules in the rule group that are not included in the input file are not affected.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update an assignment rule group (if it exists) or to insert a new assignment rule group (if it does not exist):

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

where:

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

```
C:\My Files\MyAssignmentRuleGroup.xml
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting an Assignment Rule Group

The following is an example of updating an assignment rule group (if it exists) or inserting an assignment rule group (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert AssignmentRuleGroup "C:\Oracle Migration Tool On Demand\windows\nrepository\AssignmentRuleGroup\Account\My AssignmentRuleGroup.xml"
```

**Note:** Quotation marks are required only if the path or file name contains spaces.

# Migrating Assignment Rules

The following topics provide examples of how to use the Oracle Migration Tool On Demand client with assignment rules:

- [Extracting a Single Assignment Rule](#)
- [Extracting All Assignment Rules for a Single Rule Group](#)
- [Extracting All Assignment Rules for a Single Object](#)
- [Extracting All Assignment Rules](#)
- [Updating or Inserting an Assignment Rule](#)

**Note:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting a Single Assignment Rule

This topic describes how to extract a single assignment rule from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
.../repository/AssignmentRule/RecordType/AssignmentRuleGroupName/AssignmentRuleName.xml
```

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a specific assignment rule:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule [SystemNameOfObject] [RuleGroupName] RuleName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rule applies, for example, Account. The system names for the record types are listed in *System Names for Record Types*. If you do not specify the record type, then you must specify an empty value for the *SystemNameOfObject* parameter. An empty value is specified as a set of double quotation marks ("").

**Note:** Assignment rule groups are supported only for the Account, Lead, Opportunity, and Service Request record types.

- *RuleGroupName* is the name of the rule group to which the rule belongs. If you do not specify the rule group name, then you must specify an empty value for the *RuleGroupName* parameter. An empty value is specified as a set of double quotation marks ("").
- *RuleName* is the name of the rule that you want to extract.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting a Single Assignment Rule

The following is an example of extracting a specific assignment rule:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule Account "My Assignment Rule Group" MyAssignmentRule
```

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the assignment rule group name contains spaces, then it must be enclosed with quotation marks, and if the assignment rule name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rules for a Single Rule Group

This topic describes how to extract all assignment rules for a single rule group from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rules for a single rule group:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule [SystemNameOfObject] RuleGroupName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rules apply, for example, Account. The system names for the record types are listed in *System Names for Record Types*. If you do not specify the record type, then you must specify an empty value for the *SystemNameOfObject* parameter. An empty value is specified as a set of double quotation marks ("").
- *RuleGroupName* is the name of the rule group to which the rule belongs.

**Note:** Assignment rules are supported only for the Account, Lead, Opportunity, and Service Request record types.

## Example of Extracting All Assignment Rules for a Single Rule Group

The following is an example of extracting all assignment rules for a single rule group:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule Account "My Assignment Rule Group"
```

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the assignment rule group name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rules for a Single Object

This topic describes how to extract all assignment rules for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rules for a single object:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the assignment rules apply, for example, Account. The system names for the record types are listed in *System Names for Record Types*.

**Note:** Assignment rules are supported only for the Account, Lead, Opportunity, and Service Request record types.

## Example of Extracting All Assignment Rules for a Single Object

The following is an example of extracting all assignment rules for a single object:

```
migrationtool -u UserID -s ServerURL Read AssignmentRule Account
```

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting All Assignment Rules

This topic describes how to extract all assignment rules from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all assignment rules:

```
migrationtool -u UserID -s ServerURL ReadAll AssignmentRule
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting an Assignment Rule

This topic describes how to use the `upsert` command to update an assignment rule (if it exists) or insert an assignment rule (if it does not exist) in your Oracle CRM On Demand environment; that is, a customer test environment or production environment. For the purposes of the Oracle Migration Tool On Demand client, this is known as an *Upsert operation*.

### About the Upsert Operation

The `upsert` command updates an assignment rule based on either of the following user keys:

- **User key 1.** <RuleGroupName> and <RecordType> and <RuleName>.
- **User key 2.** <RuleGroupName> and <RecordType> and <Order>.

Oracle CRM On Demand attempts to locate the rules that are specified in the input file based on the user keys. If a match is located, then the rule is updated. If a match is located for both user keys, then the match located for user key 1 takes precedence. If Oracle CRM On Demand cannot locate an assignment rule based on the user keys, then a new rule is created.



For each rule, the `upsert` command inserts or updates rule criteria and team information based on the following user keys:

- **Rule criteria.** The `<Sequence>` element, which is a child element of the `<ListofRuleCriteria>` element.
- **Team information.** The `<User>` element, which is a child element of the `<Team>` element.

**Note:** You must migrate the assignment rule group to which an assignment rule belongs before you migrate the assignment rule.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a specific assignment rule (if it exists) or to insert an assignment rule (if it does not exist):

```
migrationtool -u UserID -s ServerURL Upsert AssignmentRule AssignmentRuleXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *AssignmentRuleXML* is the fully qualified path name of the assignment rule XML file, for example:

```
C:\My Files\My Assignment Rule.xml
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (by using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting an Assignment Rule

The following is an example of updating an assignment rule (if it exists) or inserting an assignment rule (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert AssignmentRule "C:\Oracle Migration Tool On Demand\windows\nrepository\AssignmentRule\Account\MyAccountRuleGroup\My AssignmentRule1.xml"
```

**Note:** Quotation marks are required only if the path or file name contains spaces.



# 25 Migrating List Access and Order Layouts

## Migrating List Access and Order Layouts

This chapter describes how to migrate your list access and order layouts using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [List Access and Order Layouts](#)
- [Privileges Required for Migrating List Access and Order Layouts](#)
- [Elements and Sections in the List Access and Order Layout XML Output File](#)
- [Migrating List Access and Order Layouts](#)

## List Access and Order Layouts

For many record types (objects), you can specify which lists of records of that type are available for each role, and the order in which the lists are displayed on the record type's homepage. For each record type, you can create one list access and order layout for each role. For more information about list access and order layouts, see *Oracle CRM On Demand Online Help*.

The following table describes the Oracle Migration Tool On Demand client commands used with list access and order layouts. These commands are case sensitive.

Command	Description
<code>Read ListAccessAndOrder SystemNameOfObject RoleName</code>	<p>This command extracts the list access and order layouts for a specific record type (object), for one role. The parameters for the command are as follows:</p> <ul style="list-style-type: none"><li>• <i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <i>System Names for Record Types</i>.</li><li>• <i>RoleName</i> is the language-independent name of the role. For a custom role, the language-independent name of the role is generated from the role name provided by the user who creates the role.</li></ul> <p><b>Note:</b> You can determine the system names of the roles by extracting the roles, as described in <i>Extracting All Roles</i>.</p>
<code>ReadAll ListAccessAndOrder</code>	This command extracts the list access and order layouts for all record types, and for all roles.
<code>Upsert ListAccessAndOrder ListAccessAndOrderXML</code>	This command updates or inserts a list access and order layout for one record type, for one role.

# Privileges Required for Migrating List Access and Order Layouts

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `Read` and `ReadAll` commands: Enable Web Services Access.
- For the `Upsert` command: Enable Web Services Access, Customize Application, Manage Public Lists, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

# Elements and Sections in the List Access and Order Layout XML Output File

The following table describes the elements and sections in the list access and order layout XML output file.

Description	Element or Section
The <code>&lt;ListAccessAndOrder&gt;</code> section contains all of the information for one list access and order layout for one record type, for one role.	<code>&lt;data:ListAccessAndOrder&gt;</code> . . . <code>&lt;/data:ListAccessAndOrder&gt;</code>
<code>&lt;ObjectName&gt;</code> contains the system name of the record type (object), which never changes.	<code>&lt;data:ListAccessAndOrder&gt;</code> <code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code> . . . <code>&lt;/data:ListAccessAndOrder&gt;</code>
<code>&lt;RoleName&gt;</code> contains the language-independent name of the role.	<code>&lt;data:ListAccessAndOrder&gt;</code> . . . <code>&lt;data:RoleName&gt;TestRole&lt;/data:RoleName&gt;</code> . . . <code>&lt;/data:ListAccessAndOrder&gt;</code>
<code>&lt;ModifiedBy&gt;</code> contains the username of the user who last updated the layout, and the date and time the layout was last updated.	<code>&lt;data:ListAccessAndOrder&gt;</code> . . . <code>&lt;data:ModifiedBy&gt;AB User 10/26/2012 10:12:40&lt;/data:ModifiedBy&gt;</code> . . . <code>&lt;/data:ListAccessAndOrder&gt;</code>
The <code>&lt;ListOfListAccessAndOrderList&gt;</code> section contains details of the list layout for one record type, for one role.	<code>&lt;data:ListAccessAndOrder&gt;</code> . . . <code>&lt;data:ListOfListAccessAndOrderList&gt;</code>

Description	Element or Section
	<pre>                     . . .                 &lt;/data:ListOfListAccessAndOrderList&gt;             &lt;/data:ListAccessAndOrder&gt;         </pre>
<p>The &lt;ListAccessAndOrderList&gt; section contains details of one list, for one record type, for one role. It includes the following elements:</p> <ul style="list-style-type: none"> <li>• &lt;ListName&gt; contains the name of the list</li> <li>• &lt;Order&gt; indicates the order of the list within the layout, as follows:                         <ul style="list-style-type: none"> <li>○ A value of 2 or higher indicates that the list is in the Show in Short List section. The order number also indicates the position of the list within the short list of lists. The list with the lowest order number appears at the top of the short list of lists.</li> <li>○ A value of -1 indicates that the list is in the Lists Available for this Role section.</li> <li>○ A value of -2 indicates that the list is in the All Lists section.</li> </ul> </li> </ul>	<pre>             &lt;data:ListAccessAndOrder&gt;                 . . .                 &lt;data:ListOfListAccessAndOrderList&gt;                 &lt;data:ListAccessAndOrderList&gt;                 &lt;data:ListName&gt;My Active Accounts                 &lt;/data:ListName&gt;                 &lt;data:Order&gt;2&lt;/data:Order&gt;                 . . .             &lt;/data:ListAccessAndOrderList&gt;                 . . .             &lt;/data:ListOfListAccessAndOrderList&gt;                 . . .             &lt;/data:ListAccessAndOrder&gt;         </pre>

## Migrating List Access and Order Layouts

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate list access and order layouts:

- [Extracting List Access and Order Layouts for a Single Object and Role](#)
- [Extracting List Access and Order Layouts for All Objects and Roles](#)
- [Updating or Inserting List Access and Order Layouts \(Upsert\)](#)

### Extracting List Access and Order Layouts for a Single Object and Role

This topic describes how to extract the list access and order layout for a single object and role from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follow:

```
.../repository/ListAccessAndOrder/RecordType/RoleName.xml
```

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the list access and order layout for a single object and role:

```
migrationtool -u UserID -s ServerURL Read ListAccessAndOrder SystemNameOfObject RoleName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) to which the list access and order layout applies, for example, Account. The system names for the record types are listed in [System Names for Record Types](#).
- *RoleName* is the language-independent name of the role.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting List Access and Order Layouts for a Single Object and Role

The following is an example of extracting the list access and order layout for single object and role:

```
migrationtool -u UserID -s ServerURL Read ListAccessAndOrder Account ExpertRole
```

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the role name contains spaces, then it must be enclosed with quotation marks.

## Extracting List Access and Order Layouts for All Objects and Roles

This topic describes how to extract the list access and order layouts for all objects, for all roles from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the list access and order layouts for all objects, for all roles:

```
migrationtool -u UserID -s ServerURL ReadAll ListAccessAndOrder
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting List Access and Order Layouts (Upsert)

This topic describes how to update a list access and order layout for a single object and role (if the layout already exists), or insert a layout (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The `upsert` command inserts or updates list access and order layouts based on the user key: `<RoleName>` and `<ObjectName>`.

Oracle CRM On Demand attempts to locate the list access and order layout specified in the input file based on the user key. If a match is located, then the layout is updated. If Oracle CRM On Demand cannot locate a list access and order layout based on the user key, then a new layout is created for the specified record type and role.

If the layout includes public lists that were created and assigned in the source environment, and if those lists do not exist in the target environment where you are updating and inserting the list access and order layouts, then those lists are not included in the layout in the target environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update the list access and order layout for one object, for one role:

```
migrationtool -u UserID -s ServerURL Upsert ListAccessAndOrder ListAccessAndOrderXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ListAccessAndOrderXML* is the fully qualified path name of the list access and order layout XML file, for example:

```
C:\My Files\ExpertRole.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert ListAccessAndOrder "C:\My Files\ExpertRole.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a List Access and Order Layout

The following is an example of updating a list access and order layout (if it exists) or inserting the list access and order layout (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert ListAccessAndOrder "C:\Oracle Migration Tool On Demand\windows  
\repository>ListAccessAndOrder\Account\ExpertRole.xml"
```

**Note:** Quotation marks are required only if the fully qualified path name contains spaces.



# 26 Migrating Role Associations for Analytics Folders

## Migrating Role Associations for Analytics Folders

This chapter describes how to migrate the associations between roles and analytics folders using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- *Role Associations for Analytics Folders*
- *Privileges Required for Migrating Role Associations for Analytics Folders*
- *Elements and Sections in the Role Associations for Analytics XML Output File*
- *Migrating Role Associations for Analytics Folders*

## Role Associations for Analytics Folders

Users can store the analyses and dashboards that they create in folders. Folders can be created in a user's personal area in Oracle CRM On Demand and in the company wide shared folders in Oracle CRM On Demand, including the Company Wide Shared Folder and the Migrated Company Wide Shared Folder. The Company Wide Shared Folder contains a predefined Dashboards folder, under which users can create subfolders for storing dashboards.

Analyses and dashboards that are stored in a user's personal area are available only to that user. Analyses that are saved in the Company Wide Shared Folder and the Migrated Company Wide Shared Folder are available to all users by default, and dashboards that are stored in folders under the predefined Dashboards folder are available to all users by default.

However, you can limit access to the contents of subfolders in the company wide shared folders, including the subfolders in the predefined Dashboards folder, by associating roles with the subfolders. After you associate one or more roles with a folder, only users with those roles can access that folder. If no role is associated with a folder, then all users have access to the folder by default. A subfolder automatically inherits the role associations of its parent folder, but you can change the role associations for the subfolder. For more information about setting up analytics folders, see *Oracle CRM On Demand Online Help*.

**Note:** You cannot associate roles with the Dashboards subfolder under the Company Wide Shared Folder, but you can associate roles with the subfolders under the Dashboards folder.

You can use the Oracle Migration Tool On Demand client to extract and update the associations between roles and existing folders in the company wide shared folders. However, you cannot use the Oracle Migration Tool On Demand client to create analytics folders or subfolders.

The following table describes the Oracle Migration Tool On Demand client commands used with role associations for analytics folders. These commands are case sensitive.

Command	Description
<code>Read ReportFolder FolderPath</code>	<p>This command extracts the details of a specified folder and its role associations. The <i>FolderPath</i> parameter must specify the full path for the folder, including the string for the root folder. For the folders in the Company Wide Shared Folder, the root folder is:</p> <p><code>/shared/Company Analyses</code></p> <p>For the folders in the Migrated Company Wide Shared Folder, the root folder is:</p> <p><code>/shared/Migrated Company Analyses</code></p> <p>The extracted information includes the name of the folder's parent folder and the names of any subfolders.</p>
<code>ReadAll ReportFolder</code>	<p>This command extracts the details of all analytics folders and their role associations.</p>
<code>Upsert ReportFolder ReportFolderXML</code>	<p>This command updates or inserts role associations for an analytics folder.</p> <p><b>Note:</b> You can use the <code>Upsert</code> command only to add role associations for existing folders, and to set the access level for the roles. You cannot use the <code>Upsert</code> command to remove role associations from folders or to create new folders or subfolders.</p>

## Privileges Required for Migrating Role Associations for Analytics Folders

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `Read` and `ReadAll` commands: Enable Web Services Access, Manage Roles and Access, Manage Custom Reports (to extract role associations for folders containing analyses), and Manage Dashboards (to extract role associations for folders under the predefined Dashboards folder). In addition, to extract role associations for the folders in the Migrated Company Wide Shared Folder, the Access Migrated Company Wide Shared Folder privilege is required.
- For the `Upsert` command: Enable Web Services Access, Manage Roles and Access, Manage Custom Reports (to update or insert role associations for folders containing analyses), and Manage Dashboards (to update or insert role associations for folders under the predefined Dashboards folder). In addition, to update or insert role associations for the folders in the Migrated Company Wide Shared Folder, the Access Migrated Company Wide Shared Folder privilege is required.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

# Elements and Sections in the Role Associations for Analytics XML Output File

The following table describes the elements and sections in the role associations for analytics folders XML output file.

Description	Element or Section
The <ReportFolder> section contains all of the information for a single folder and its subfolders.	<pre>&lt;data:ReportFolder&gt; . . . &lt;/data:ReportFolder&gt;</pre>
<p>&lt;Catalog&gt; contains the catalog version for the folder. The valid value is V3.</p> <p><b>Note:</b> When you insert or update the role associations for a folder, you must either set the &lt;Catalog&gt; element to V3 or leave it empty. If you leave the element empty, then V3 is used by default.</p>	<pre>&lt;data:ReportFolder&gt;   &lt;data:Catalog&gt;V3&lt;/data:Catalog&gt; . . . &lt;/data:ReportFolder&gt;</pre>
<Path> contains the path for the folder.	<pre>&lt;data:ReportFolder&gt; . . .   &lt;data:Path&gt;/shared/Company Analyses/   Test Folder&lt;/data:Path&gt; . . . &lt;/data:ReportFolder&gt;</pre>
<FolderName> contains the name of the folder.	<pre>&lt;data:ReportFolder&gt; . . .   &lt;data:FolderName&gt;Test Folder   &lt;/data:FolderName&gt; . . . &lt;/data:ReportFolder&gt;</pre>
<Description> contains the description of the folder, if a description exists.	<pre>&lt;data:ReportFolder&gt; . . .   &lt;data:Description&gt;This is my test   folder&lt;/data:Description&gt; . . . &lt;/data:ReportFolder&gt;</pre>
<ParentFolder> contains the name of the parent folder. If the folder is created directly in the company wide shared folder, then the name of the parent folder is Company Analyses.	<pre>&lt;data:ReportFolder&gt; . . .   &lt;data:ParentFolder&gt;Company Analyses   &lt;/data:ParentFolder&gt; . . . &lt;/data:ReportFolder&gt;</pre>

Description	Element or Section
<p>The &lt;ListOfSubFolders&gt; section contains details of the subfolders under the current folder, if any exist.</p>	<pre>&lt;data:ReportFolder&gt; . . . &lt;data:ListOfSubFolders&gt; . . . &lt;/data:ListOfSubFolders&gt; . . . &lt;/data:ReportFolder&gt;</pre>
<p>The &lt;SubFolder&gt; section contains details of one subfolder. It includes the following elements:</p> <ul style="list-style-type: none"> <li>• &lt;Catalog&gt; contains the catalog version for the subfolder.</li> <li>• &lt;Path&gt; contains the path to the subfolder.</li> <li>• &lt;FolderName&gt; contains the name of the subfolder.</li> <li>• &lt;Description&gt; contains a description of the subfolder.</li> </ul>	<pre>&lt;data:ReportFolder&gt; . . . &lt;data:ListOfSubFolders&gt; &lt;data:SubFolder&gt; &lt;data:Catalog&gt;V3&lt;/data:Catalog&gt; &lt;data:Path&gt;/shared/Company Analyses/ Test Folder/Test Folder A&lt;/data:Path&gt; &lt;data:FolderName&gt;Test Folder A &lt;/data:FolderName&gt; &lt;data:Description/&gt; &lt;/data:SubFolder&gt; . . . &lt;/data:ListOfSubFolders&gt; . . . &lt;/data:ReportFolder&gt;</pre>
<p>The &lt;ListOfAssociatedRoles&gt; section contains details of the role associations for the folder.</p>	<pre>&lt;data:ReportFolder&gt; . . . &lt;data:ListOfAssociatedRoles&gt; . . . &lt;/data:ListOfAssociatedRoles&gt; &lt;/data:ReportFolder&gt;</pre>
<p>The &lt;AssociatedRole&gt; section contains details of a single role association, including the following:</p> <ul style="list-style-type: none"> <li>• &lt;RoleName&gt; is the name of the role.</li> <li>• &lt;AccessLevel&gt; is the level of access that is given to this role for this folder.</li> </ul>	<pre>&lt;data:ReportFolder&gt; . . . &lt;data:ListOfAssociatedRoles&gt; &lt;data:AssociatedRole&gt; &lt;data:RoleName&gt;User Role2 &lt;/data:RoleName&gt; &lt;data:AccessLevel&gt;Change/Delete &lt;/data:AccessLevel&gt; &lt;/data:AssociatedRole&gt; . . . &lt;/data:ListOfAssociatedRoles&gt; &lt;/data:ReportFolder&gt;</pre>

## Migrating Role Associations for Analytics Folders

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate role associations for analytics folders:

- [Extracting Role Associations for a Single Analytics Folder](#)
- [Extracting Role Associations for All Analytics Folders](#)
- [Updating or Inserting Role Associations for Analytics Folders](#)

## Extracting Role Associations for a Single Analytics Folder

This topic describes how to extract the role associations for a single analytics folder from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the role associations for a single analytics folder:

```
migrationtool -u UserID -s ServerURL Read ReportFolder FolderPath
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *FolderPath* is the path for the folder for which you want to extract the role associations.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Role Associations for a Single Analytics Folder

The following is an example of extracting the role associations for a single analytics folder. In this example, the folder named Test Folder A is a subfolder of the folder named Test Folder:

```
migrationtool -u UserID -s ServerURL Read ReportFolder "/shared/Company Analyses/Test Folder/Test Folder A"
```

**Note:** Quotation marks are always required for the folder path, because the path for the root folder (/shared/Company Analyses or /shared/Migrated Company Analyses) contains a space.

## Extracting Role Associations for All Analytics Folders

This topic describes how to extract the role associations for all analytics folders from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the role associations for all analytics folders:

```
migrationtool -u UserID -s ServerURL ReadAll ReportFolder
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.

- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting Role Associations for Analytics Folders

This topic describes how to insert or update role associations for an analytics folder on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The `upsert` command inserts or updates role associations for analytics folders based on the following user keys:

- `<Path>`
- `<Path>` and `<Catalog>`

**Note:** The `<Catalog>` element must either be set to `V3` or left empty. If you leave the `<Catalog>` element empty, then `V3` is used by default.

Oracle CRM On Demand attempts to locate the folder specified in the input file based on the user key. If an existing folder that matches the value in the `<Path>` element is located, then the following happens:

- If a role association that is specified in the input file already exists for that folder, and if the access level that is specified for the role in the input file is different from the existing access level for the role, then the role association is updated. Otherwise, the existing role association is left unchanged.
- If a role association that is specified in the input file does not already exist for the folder, then the role association is inserted for the folder.
- Any existing role associations for the folder that are not specified in the input file are left unchanged.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update role associations for an analytics folder:

```
migrationtool -u UserID -s ServerURL Upsert ReportFolder ReportFolderXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ReportFolderXML* is the fully qualified path name of the XML file containing the role associations for the analytics folder, for example:

```
C:\My Files\Test Folder.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert ReportFolder "C:\My Files\Test Folder.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting Role Associations for an Analytics Folder

The following is an example of updating or inserting role associations for an analytics folder in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert ReportFolder "C:\Oracle Migration Tool On Demand\windows  
\repository\ReportFolder\MyFolder.xml"
```

**Note:** Quotation marks are required only if the path or file name contains spaces.





# 27 Migrating Custom HTML Head Tag Additions

## Migrating Custom HTML Head Tag Additions

This chapter describes how to migrate your custom HTML head tag additions using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- *Custom HTML Head Tag Additions*
- *Privileges Required for Migrating Custom HTML Head Tag Additions*
- *Elements in the Custom HTML Head Tag Additions XML Output File*
- *Migrating Custom HTML Head Tag Additions*

## Custom HTML Head Tag Additions

*Custom HTML head tag additions* are custom `<script>` elements that you can add to the HTML `<head>` element of the Oracle CRM On Demand pages. For example, the `<script>` elements can contain custom JavaScript code that creates custom buttons on your pages. Your custom code can also reference JavaScript files that were uploaded through client side extensions or external JavaScript files. HTML head tag additions apply to all pages in Oracle CRM On Demand.

The following table describes the Oracle Migration Tool On Demand client commands used with custom HTML head tag additions. These commands are case sensitive.

Command	Description
<code>ReadForValue CustomHTMLHeadTag</code>	This command exports the custom HTML head tag additions for the Oracle CRM On Demand pages.
<code>Upsert CustomHTMLHeadTag CustomHTMLHeadTagXML</code>	This command inserts the custom HTML head tag additions that are specified in the XML file. If any custom HTML head tag additions exist in the target environment, then they are overwritten by the content of the input file.

## Privileges Required for Migrating Custom HTML Head Tag Additions

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `ReadForValue` command: Enable Web Services Access, and Upload Client Side Extensions and Manage Custom HTML Head Tag.
- For the `Upsert` command: Enable Web Services Access and Upload Client Side Extensions and Manage Custom HTML Head Tag.

## Elements in the Custom HTML Head Tag Additions XML Output File

The following table describes the elements in the custom HTML head tag additions XML output file.

Description	Element
<HTMLHeadAdditions> contains the HTML head tag additions.	<code>&lt;data:HTMLHeadAdditions&gt;</code> <code>&lt;/data:HTMLHeadAdditions&gt;</code>

## Migrating Custom HTML Head Tag Additions

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate custom HTML head tag additions:

- [Extracting Custom HTML Head Tag Additions](#)
- [Updating or Inserting Custom HTML Head Tag Additions](#)

### Extracting Custom HTML Head Tag Additions

This topic describes how to extract the custom HTML head tag additions from the HTML head tag.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the custom HTML head tag additions:

```
migrationtool -u UserID -s ServerURL ReadForValue CustomHTMLHeadTag
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting Custom HTML Head Tag Additions

This topic describes how to update or insert custom HTML head tag additions for the Oracle CRM On Demand pages in your Oracle CRM On Demand environment (customer test environment or production). If any custom HTML head tag additions exist, then they are overwritten by the content of the input file.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update or insert custom HTML head tag additions in the HTML <head> element of the Oracle CRM On Demand pages:

```
migrationtool -u UserID -s ServerURL Upsert CustomHTMLHeadTag CustomHTMLHeadTagXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *CustomHTMLHeadTagXML* is the fully qualified path name of the custom HTML head tag additions XML file, for example:

```
C:\MyFiles\CustomHTMLHeadTag.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert CustomHTMLHeadTag "C:\My Files\CustomHTMLHeadTag.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.



# 28 Migrating Field Audit Setup Information

## Migrating Field Audit Setup Information

This chapter describes how to migrate your field audit setup information using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Field Audit Setup](#)
- [Privileges Required for Migrating Field Audit Setup Information](#)
- [Elements and Sections in the Field Audit Setup XML Output File](#)
- [Migrating Field Audit Setup Information](#)

## Field Audit Setup

The audit trail functionality allows your company to track changes to certain fields on records, and to track the creation, deletion, and restoration of records. The *field audit setup* for a record type determines which fields are audited for that record type, and whether the creation, deletion, and restoration of records of that type are tracked. For some record types, certain fields are audited by default. For other record types, no fields are audited by default. Your administrator can configure the audit trail for each record type that supports the audit trail functionality. For more information about field audit setup and the record types that can be audited, see *Oracle CRM On Demand Online Help* .

The following table describes the Oracle Migration Tool On Demand client commands used with field audit setup. These commands are case sensitive.

Command	Description
<code>Read FieldAuditSetUp SystemNameOfObject</code>	This command extracts the field audit setup information for a specific record type (object).  <i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <i>System Names for Record Types</i> .
<code>ReadAll FieldAuditSetUp</code>	This command extracts the field audit setup information for all objects.
<code>Upsert FieldAuditSetUp FieldAuditSetUpXML</code>	This command updates or inserts the field audit setup information for an object.

# Privileges Required for Migrating Field Audit Setup Information

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `Read` and `ReadAll` commands: Enable Web Services Access, Administer Field Audit, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.
- For the `Upsert` command: Enable Web Services Access, Administer Field Audit, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

# Elements and Sections in the Field Audit Setup XML Output File

The following table describes the elements and sections in the field audit setup XML output file.

Description	Element or Section
<ObjectName> contains the system name of the record type (object), which never changes.	<code>&lt;data:ObjectName&gt;Account&lt;/data:ObjectName&gt;</code>
<AuditRecordCreation> specifies whether the creation of records of this record type is tracked (true) or is not tracked (false).	<code>&lt;data:AuditRecordCreation&gt;&gt;true&lt;/data:AuditRecordCreation&gt;</code>
<AuditRecordDeletionOrRestore> specifies whether the deletion and restoration of records of this record type are tracked (true) or are not tracked (false).	<code>&lt;data:AuditRecordDeletionOrRestore&gt;true&lt;/data:AuditRecordDeletionOrRestore&gt;</code>
The <ListOfFields> section contains details of the fields that can be audited for the record type.	<code>&lt;data:ListOfFields&gt; . . . &lt;/data:ListOfFields&gt;</code>
The <Field> section contains the details for one field. It contains the following elements:	<code>&lt;data:ListOfFields&gt; &lt;data:Field&gt; &lt;data:Name&gt;Furigana Name&lt;/data:Name&gt; &lt;data:IsAudited&gt;true&lt;/data:IsAudited&gt; &lt;/data:Field&gt; . . .</code>

Description	Element or Section
<ul style="list-style-type: none"><li>• &lt;Name&gt; contains the system name of the field, which never changes.</li><li>• &lt;IsAudited&gt; specifies whether changes to the field are tracked (true) or are not tracked (false).</li></ul>	</data:ListOfFields>

## Migrating Field Audit Setup Information

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate field audit setup information:

- [Extracting Field Audit Setup Information for a Single Object](#)
- [Extracting Field Audit Setup Information for All Objects](#)
- [Updating Field Audit Setup Information \(Upsert\)](#)

### Extracting Field Audit Setup Information for a Single Object

This topic describes how to extract the field audit setup information for a single object from your Oracle CRM On Demand environment.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the field audit setup information for a single object:

```
migrationtool -u UserID -s ServerURL Read FieldAuditSetUp SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) whose field audit setup information you want to extract, for example, Account Contact. The system names for the record types are listed in [System Names for Record Types](#).

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Field Audit Setup Information for a Single Object

The following is an example of extracting the field audit setup information for the Account object:

```
migrationtool -u UserID -s ServerURL Read FieldAuditSetUp Account
```

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting Field Audit Setup Information for All Objects

This topic describes how to extract the field audit setup information for all objects from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the field audit setup for all objects:

```
migrationtool -u UserID -s ServerURL ReadAll FieldAuditSetUp
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating Field Audit Setup Information (Upsert)

This topic describes how to update the field audit setup information for a single object on your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update the field audit setup information for an object:

```
migrationtool -u UserID -s ServerURL Upsert FieldAuditSetUp FieldAuditSetUpXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *FieldAuditSetUpXML* is the fully qualified path name of the field audit setup XML file, for example:

```
C:\My Files\Account.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:



```
migrationtool -u UserID -s ServerURL Upsert FieldAuditSetUp "C:\My Files\Account.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.



# 29 Migrating Sales Categories

## Migrating Sales Categories

This chapter describes how to migrate your sales categories using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- *Sales Categories*
- *Privileges Required for Migrating Sales Categories*
- *Elements and Sections in the Sales Categories XML Output File*
- *Migrating Sales Categories*

## Sales Categories

*Sales categories* are used to organize sales stages from different sales processes into groups. You can run analyses against the sales categories.

The following table describes the Oracle Migration Tool On Demand client commands used with sales categories. These commands are case sensitive.

Command	Description
<code>Read SalesCategory Order</code>	This command extracts a sales category. The <i>Order</i> parameter specifies the order number of the sales category.
<code>ReadAll SalesCategory</code>	This command extracts all sales categories.
<code>Upsert SaleCategory SalesCategoryXML</code>	This command updates or inserts the sales categories specified in the XML file.

## Privileges Required for Migrating Sales Categories

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `Read` and `ReadAll` commands: Enable Web Services Access and Manage Data Rules - Manage Sales Stage Definition.
- For the `Upsert` command: Enable Web Services Access and Manage Data Rules - Manage Sales Stage Definition.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

# Elements and Sections in the Sales Categories XML Output File

The following table describes the elements and sections in the sales categories XML output file.

Description	Element or Section
<p>&lt;SalesCategory&gt; contains the details of the sales category, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;StageCategory&gt; is the name of the sales category.</li> <li>• &lt;Description&gt; is a description of the sales category.</li> <li>• &lt;Order&gt; is the order number of the sales category.</li> <li>• &lt;MarkForTranslation&gt; corresponds to the Mark for Translation check box in the UI. For more information, see <i>Considerations for the Mark for Translation Setting</i>.</li> </ul>	<pre>&lt;data:SalesCategory&gt;   &lt;data:StageCategory&gt;[Test Sales Category] &lt;/data:StageCategory&gt;   &lt;data:Description&gt;This is a test sales category&lt;/data:Description&gt;   &lt;data:Order&gt;1&lt;/data:Order&gt;   &lt;data:MarkForTranslation&gt;false &lt;/data:MarkForTranslation&gt;   . . . &lt;/data:SalesCategory&gt;</pre>
<p>The &lt;ListOfSalesCategoryTranslations&gt; section contains the translation values for the sales category.</p>	<pre>&lt;data:SalesCategory&gt; . . .   &lt;data:ListOfSalesCategoryTranslations&gt; . . . &lt;/data:ListOfSalesCategoryTranslations&gt; &lt;/data:SalesCategory&gt;</pre>
<p>The &lt;SalesCategoryTranslation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageCode&gt; contains the three-letter language code for the language. For the list of language codes, see <i>Language Codes and Their Corresponding Language and Country</i>.</li> <li>• &lt;StageCategory&gt; contains the sales category name in the language identified by the language code.</li> <li>• &lt;Description&gt; contains the description in the language identified by the language code.</li> </ul>	<pre>&lt;data:SalesCategory&gt; . . .   &lt;data:ListOfSalesCategoryTranslations&gt;   &lt;data:SalesCategoryTranslation&gt;   &lt;data:LanguageCode&gt;ENU&lt;/data:LanguageCode&gt;   &lt;data:StageCategory&gt;My Test Sales Category 2&lt;/data:StageCategory&gt;   &lt;data:Description&gt;&lt;/data:Description&gt;   &lt;/data:SalesCategoryTranslation&gt; . . .   &lt;/data:ListOfSalesCategoryTranslations&gt; &lt;/data:SalesCategory&gt;</pre>

# Migrating Sales Categories

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate sales categories:

- [Extracting a Single Sales Category](#)
- [Extracting All Sales Categories](#)
- [Updating or Inserting Sales Categories \(Upsert\)](#)

## Extracting a Single Sales Category

This topic describes how to extract a single sales category from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a sales category:

```
migrationtool -u UserID -s ServerURL Read SalesCategory Order
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *Order* is the order number of the sales category.

The output XML file is named with the order number of the sales category that is extracted. For example, if you extract the sales category that has the order number 2, then the XML file is named 2.xml.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Sales Category

The following is an example of extracting a sales category that has the order number 2:

```
migrationtool -u UserID -s ServerURL Read SalesCategory 2
```

## Extracting All Sales Categories

This topic describes how to extract all of the sales categories from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all of the sales categories:

```
migrationtool -u UserID -s ServerURL ReadAll SalesCategory
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

The output XML file is named with the order number of the first sales category in the file. For example, if the first sales category has the order number 1, then the XML file is named 1.xml.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting Sales Categories (Upsert)

This topic describes how to update a sales category (if it exists) or insert a sales category (if it does not exist) in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update a sales category (if it exists) or insert a sales category (if it does not exist):

```
migrationtool -u UserID -s ServerURL Upsert SalesCategory SalesCategoryXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SalesCategoryXML* is the fully qualified path name of the sales categories XML file, for example:

```
C:\MyFiles\1.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert SalesCategory "C:\My Files\1.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

# 30 Migrating Modification Tracking Settings

## Migrating Modification Tracking Settings

This chapter describes how to migrate your modification tracking settings using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- *Modification Tracking Settings*
- *Privileges Required for Migrating Modification Tracking Settings*
- *Elements and Sections in the Modification Tracking Settings XML Output File*
- *Migrating Modification Tracking Settings*

## Modification Tracking Settings

The modification tracking feature allows you to track run-time modifications to records of certain record types. You can use the Oracle Migration Tool On Demand client to migrate your modification tracking settings, and to enable or disable modification tracking for record types.

### Objects Supported for Modification Tracking

In addition to tracking run-time modifications to record types such as Account, Contact, and so on, the modification tracking feature can also track changes to the lists of values for picklist fields. For more information about modification tracking, see *Oracle CRM On Demand Online Help*, which also provides a list of the record types that support modification tracking.

The following table describes the Oracle Migration Tool On Demand client commands used with modification tracking settings. These commands are case sensitive.

Command	Description
<code>Read EnableModificationTracking SystemNameOfObject</code>	This command extracts the modification tracking setting for a specific record type (object).  <i>SystemNameOfObject</i> is the system name of the record type. The system names for the record types are listed in <i>System Names for Record Types</i> .  <b>Note:</b> The system name of the Picklist object is Picklist.
<code>ReadAll EnableModificationTracking</code>	This command extracts the modification tracking settings for all objects.
<code>Upsert EnableModificationTracking EnableModificationTrackingXML</code>	This command updates or inserts the modification tracking settings for one or more objects.

## Privileges Required for Migrating Modification Tracking Settings

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `Read` and `ReadAll` commands: Enable Web Services Access and Manage Modification Tracking.
- For the `Upsert` command: Enable Web Services Access, Manage Modification Tracking, Manage Roles and Access, and Manage Object Access for custom objects that have been set up in the company tenant, for example, Customize Application - Manage Custom Object 01, and so on.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Modification Tracking Settings XML Output File

The following table describes the elements and sections in the modification tracking settings XML output file.

Description	Element or Section
<p>The <code>&lt;EnableModificationTracking&gt;</code> section contains the details of the modification tracking setting for one record type (object). It includes the following elements:</p> <ul style="list-style-type: none"> <li>• <code>&lt;Object&gt;</code> contains the system name of the record type (object), which never changes.</li> <li>• <code>&lt;Enabled&gt;</code> contains the setting for modification tracking for the object. Valid values are true (modification tracking is enabled for the object) and false (modification tracking is not enabled for the object).</li> </ul>	<pre> &lt;data:ListOfEnableModificationTracking&gt;   &lt;data:EnableModificationTracking&gt;     &lt;data:Object&gt;Account&lt;/data:Object&gt;     &lt;data:Enabled&gt;&gt;true&lt;/data:Enabled&gt;   &lt;/data:EnableModificationTracking&gt;   . . . &lt;/data:ListOfEnableModificationTracking&gt;                     </pre>

## Migrating Modification Tracking Settings

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate modification tracking settings:

- *Extracting Modification Tracking Settings for a Single Object*
- *Extracting Modification Tracking Settings for All Objects*



- [Updating Modification Tracking Settings \(Upsert\)](#)

## Extracting Modification Tracking Settings for a Single Object

This topic describes how to extract the modification tracking settings for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
.../repository/EnableModificationTracking/RecordType.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the modification tracking settings for a single object:

```
migrationtool -u UserID -s ServerURL Read EnableModificationTracking SystemNameOfObject
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) whose modification tracking settings you want to extract, for example, Account. The system names for the record types are listed in [System Names for Record Types](#).

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting Modification Tracking Settings for a Single Object

The following is an example of extracting the modification tracking settings for a single object:

```
migrationtool -u UserID -s ServerURL Read EnableModificationTracking Account
```

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks.

## Extracting Modification Tracking Settings for All Objects

This topic describes how to extract the modification tracking settings for all objects from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a single file in the following directory:

```
.../repository/EnableModificationTracking
```

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the modification tracking settings for all objects:

```
migrationtool -u UserID -s ServerURL ReadAll EnableModificationTracking
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating Modification Tracking Settings (Upsert)

This topic describes how to update the modification tracking settings in your Oracle CRM On Demand environment (customer test environment or production).

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to update the modification tracking settings:

```
migrationtool -u UserID -s ServerURL Upsert EnableModificationTracking EnableModificationTrackingXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *EnableModificationTrackingXML* is the fully qualified path name of the modification tracking settings XML file, for example:

```
C:\My Files\Account.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert EnableModificationTracking "C:\My Files\Account.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating Modification Tracking Settings

The following is an example of updating the modification tracking settings in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert EnableModificationTracking "C:\Oracle Migration Tool On Demand  
\windows\repository\EnableModificationTracking\Account.xml"
```

**Note:** Quotation marks are required only if the fully qualified path name contains spaces.



# 31 Migrating Process Administration Configuration Data

## Migrating Process Administration Configuration Data

This chapter describes how to migrate process administration configuration data using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- *Process Administration*
- *Process Administration Transition States*
- *Privileges Required for Migrating Process Administration Configuration Data*
- *Privileges Required for Migrating Process Administration Transition States*
- *Elements and Sections in the Process Administration XML Output File*
- *Elements and Sections in the Process Administration Transition States XML Output File*
- *Migrating Process Administration Configuration Data*
- *Migrating Process Administration Transition States*

## Process Administration

For certain record types, administrators can set up processes to prevent users, including external applications, from performing certain actions on records of that type when the records are in a particular state. Preventing users from performing certain actions in this way is referred to as *record locking*.

You can set up only one process for each of the record types that support process administration. For more information about process administration and the record types that support it, see *Oracle CRM On Demand Online Help*.

The following table describes the Oracle Migration Tool On Demand client commands used with process administration. These commands are case sensitive.

Command	Description
<code>Read ProcessAdministration SystemNameOfObject [ProcessName]</code>	<p>This command extracts the process administration configuration data for a specific record type. The parameters are as follows:</p> <ul style="list-style-type: none"> <li>• <i>SystemNameOfObject</i> is the system name of a record type. If you specify a process name in the command, then you do not need to specify a record type, but you must include an empty value for the <i>SystemNameOfObject</i> parameter. An empty value is specified as a set of double quotation marks (""). The system names for the record types are listed in <i>System Names for Record Types</i>.</li> <li>• <i>ProcessName</i> is the name of a process. This parameter is optional if you specify a record type in the command.</li> </ul>
<code>ReadAll ProcessAdministration</code>	This command extracts the process administration configuration data for all record types.

Command	Description
<b>Upsert ProcessAdministration ProcessXML</b>	This command updates or inserts the process administration configuration data for one record type.

## Process Administration Transition States

In a process for a record type, administrators can set up a number of transition states. A *transition state* represents a state that a record enters when certain conditions are met. For more information about process administration transition states, see *Oracle CRM On Demand Online Help*.

The following table describes the Oracle Migration Tool On Demand client commands used with process administration transition states. These commands are case sensitive.

Command	Description
<b>Delete ProcessAdministrationTransitionState SystemNameOfObject [ProcessName] StateName</b>	<p>The <b>Delete ProcessAdministrationTransitionState</b> command deletes a single transition state. When you delete a transition state, the field setup and related access control configurations for the transition state are also deleted. The parameters are as follows:</p> <ul style="list-style-type: none"> <li>• <i>SystemNameOfObject</i> is the system name of a record type. This parameter is optional if the name of the process is specified. If you do not specify a record type, then you must include an empty value for the <i>SystemNameOfObject</i> parameter. An empty value is specified as a set of double quotation marks (""). The system names for the record types are listed in <i>System Names for Record Types</i>.</li> <li>• <i>ProcessName</i> is the name of a process. This parameter is optional if the name of the record type is specified. If you do not specify a process name, then you must include an empty value for the <i>ProcessName</i> parameter.</li> <li>• <i>StateName</i> is the name of a transition state, which must be specified.</li> </ul>
<b>Read ProcessAdministrationTransitionState SystemNameOfObject [ProcessName] [StateName]</b>	<p>The <b>Read ProcessAdministrationTransitionState</b> command extracts a single transition state or all of the transition states for a process. The parameters are as follows:</p> <ul style="list-style-type: none"> <li>• <i>SystemNameOfObject</i> is the system name of a record type. This parameter is optional if the name of the process is specified. If you do not specify a record type, then you must include an empty value for the <i>SystemNameOfObject</i> parameter. An empty value is specified as a set of double quotation marks ("").</li> <li>• <i>ProcessName</i> is the name of a process. This parameter is optional if the name of the record type is specified. However, if you want to specify the name of a transition state in the command and you do not specify a process name, then you must include an empty value for the <i>ProcessName</i> parameter.</li> <li>• <i>StateName</i> is the name of a transition state. You can extract a single transition state by specifying the name of the transition state. If you do not specify a transition state, then all of the transition states for the specified process or record type are extracted.</li> </ul>
<b>ReadAll ProcessAdministrationTransitionState</b>	The <b>ReadAll ProcessAdministrationTransitionState</b> command extracts all of the transition states for all record types.

Command	Description
<code>Upsert ProcessAdministrationTransitionStateXML</code>	The <code>Upsert ProcessAdministrationTransitionState</code> command updates or inserts a transition state.

## Privileges Required for Migrating Process Administration Configuration Data

The following privileges are required for the user account running the Oracle Migration Tool On Demand client for all of the commands for migrating process administration configuration data:

- Enable Web Services Access
- Process Administration

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Privileges Required for Migrating Process Administration Transition States

The following privileges are required for the user account running the Oracle Migration Tool On Demand client for all of the commands for migrating process administration transition states:

- Enable Web Services Access
- Process Administration

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Process Administration XML Output File

The following table describes the elements and sections in the process administration XML output file.

Description	Element or Section
The <Process> section contains all of the information for one process.	<code>&lt;data:Process&gt;</code> . . . <code>&lt;/data:Process&gt;</code>

Description	Element or Section
<p>&lt;RecordType&gt; contains the system name of the record type (object), which never changes.</p>	<pre>&lt;data:Process&gt;   &lt;data:RecordType&gt;Activity&lt;/data:RecordType&gt;   . . . &lt;/data:Process&gt;</pre>
<p>&lt;ProcessName&gt; contains the name given to the process.</p>	<pre>&lt;data:Process&gt;   . . .   &lt;data:ProcessName&gt;Activity Process   &lt;/data:ProcessName&gt;   . . . &lt;/data:Process&gt;</pre>
<p>&lt;PrimaryField&gt; contains the name of the field in the record type that is to be used as a filter to restrict the process to certain records of the record type.</p> <p>Only the Activity record type supports the use of a primary field to restrict the process.</p>	<pre>&lt;data:Process&gt;   . . .   &lt;data:PrimaryField&gt;Category   &lt;/data:PrimaryField&gt;   . . . &lt;/data:Process&gt;</pre>
<p>&lt;TransitionField&gt; contains the name of the field in the record type that determines the transition of records from one transition state to another.</p> <p>The Status field must be used as the transition field for all supported record types.</p>	<pre>&lt;data:Process&gt;   . . .   &lt;data:TransitionField&gt;Status   &lt;/data:TransitionField&gt;   . . . &lt;/data:Process&gt;</pre>
<p>&lt;Description&gt; contains the description of the process.</p>	<pre>&lt;data:Process&gt;   . . .   &lt;data:Description&gt;This is a test process.   &lt;/data:Description&gt;   . . . &lt;/data:Process&gt;</pre>
<p>&lt;Order&gt; indicates the order of this process within the processes for the record type. The Order field is set to 1 by default, and you cannot update the field to a different value.</p> <p><b>Note:</b> If you specify an invalid value, such as a non-numeric string, for this element when you insert or update a process, then an error is returned.</p>	<pre>&lt;data:Process&gt;   . . .   &lt;data:Order&gt;1&lt;/data:Order&gt;   . . . &lt;/data:Process&gt;</pre>
<p>&lt;Default&gt; indicates if the process is the default process for the record type (true). The Default field is set to true by default, and you cannot update the field value to false.</p>	<pre>&lt;data:Process&gt;   . . .   &lt;data:Default&gt;&gt;true&lt;/data:Default&gt;   . . . &lt;/data:Process&gt;</pre>



Description	Element or Section
<p>The &lt;ListOfPrimaryValues&gt; section contains the values in the primary field that are valid for the process. A record will be locked by the process only if the value in the primary field on the record is set to one of the values specified within the &lt;ListOfPrimaryValues&gt; section.</p>	<pre>&lt;data:Process&gt; . . . &lt;data:ListOfPrimaryValues&gt; &lt;data:PrimaryValues&gt; &lt;data:Value&gt;Account Call&lt;/data:Value&gt; &lt;/PrimaryValues&gt; &lt;data:PrimaryValues&gt; &lt;data:Value&gt;Attendee Call&lt;/data:Value&gt; &lt;/data:PrimaryValues&gt; . . . &lt;/data:ListOfPrimaryValues&gt; . . . &lt;/data:Process&gt;</pre>
<p>The &lt;ListOfTransitionStates&gt; section contains the details of the transition states for the process.</p>	<pre>&lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;</pre>
<p>The &lt;TransitionStates&gt; section contains the details of one transition state for the process.</p>	<pre>&lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;</pre>
<p>&lt;State&gt; contains the transition field value that identifies this transition state. Each transition field value can be used with only one transition state in the process.</p> <p>For upsert operations, the value in the &lt;State&gt; element must match an existing picklist value in the Status field for the record type.</p>	<pre>&lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; &lt;data:State&gt;Deferred&lt;/data:State&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;</pre>
<p>&lt;Category&gt; contains the name of the sales category that the transition state is associated with.</p>	<pre>&lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; . . . &lt;data:Category&gt;Software&lt;/data:Category&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;</pre>
<p>&lt;Description&gt; contains a description of the transition state.</p>	<pre>&lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt;</pre>

Description	Element or Section
	<pre> . . . &lt;data:Description&gt;Test &lt;/data:Description&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;                     </pre>
<p>&lt;Created&gt; contains the username of the user who created the transition state, and the date and time the transition state was created.</p>	<pre> &lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; . . . &lt;data:Created&gt;ABC User 10/26/2012 10:12:40&lt;/data:Created&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;                     </pre>
<p>&lt;Modified&gt; contains the username of the user who last updated the transition state, and the date and time the transition state was last updated.</p>	<pre> &lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; . . . &lt;data:Modified&gt;ABC User 11/23/2016 11:27:40&lt;/data:Modified&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;                     </pre>
<p>&lt;Condition&gt; contains a condition that determines whether a record can move to this transition state.</p> <p><b>Note:</b> Do not use any calculated fields in the expression. Calculated fields are not supported in expressions in the Condition field on transition states.</p>	<pre> &lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; . . . &lt;data:Condition&gt;[{Priority}]="3-Low" &lt;/data:Condition&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;                     </pre>
<p>&lt;ErrorMessage&gt; contains the text for the error message that appears if the condition that is set up for the transition state is not met when a user tries to move a record of the record type specified in the process to this transition state.</p>	<pre> &lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; . . . &lt;data:ErrorMessage&gt; &lt;/data:ErrorMessage&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt;                     </pre>

Description	Element or Section
	<code>&lt;/data:Process&gt;</code>
<p><code>&lt;DisableUpdate&gt;</code> determines whether a record can be updated when the record is in this state. If this element is set to true, then users, including external applications, cannot update records of the record type specified in the process when the records are in this transition state.</p>	<pre> &lt;data:Process&gt; . . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; . . . &lt;data:DisableUpdate&gt; &lt;/data:DisableUpdate&gt; . . . &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;                     </pre>
<p><code>&lt;DisableDeleteOrRemove&gt;</code> determines whether a record can be deleted when the record is in this state. If this element is set to true, then users, including external applications, cannot delete records of the record type specified in the process while the records are in this transition state.</p>	<pre> &lt;data:Process&gt; . . &lt;data:ListOfTransitionStates&gt; &lt;data:TransitionStates&gt; . . . &lt;data:DisableDeleteOrRemove&gt; &lt;/data:DisableDeleteOrRemove&gt; &lt;/data:TransitionStates&gt; . . . &lt;/data:ListOfTransitionStates&gt; &lt;/data:Process&gt;                     </pre>

## Elements and Sections in the Process Administration Transition States XML Output File

The following table describes the elements and sections in the process administration transition states XML output file.

Description	Element or Section
<p>The <code>&lt;TransitionState&gt;</code> section contains all of the information for one transition state.</p>	<pre> &lt;data:TransitionState&gt; . . . &lt;/data:TransitionState&gt;                     </pre>
<p><code>&lt;RecordType&gt;</code> contains the system name of the record type (object), which never changes. This element is read-only and is ignored for upsert requests.</p>	<pre> &lt;data:TransitionState&gt; &lt;data:RecordType&gt;Activity&lt;/data:RecordType&gt; . . . &lt;/data:TransitionState&gt;                     </pre>
<p><code>&lt;ProcessName&gt;</code> contains the name given to the process. This element is read-only and is ignored for upsert requests.</p>	<pre> &lt;data:TransitionState&gt; . . . &lt;data:ProcessName&gt;Activity Process &lt;/data:ProcessName&gt; . . . &lt;/data:TransitionState&gt;                     </pre>

Description	Element or Section
<p>&lt;State&gt; contains the transition field value that identifies the transition state. Each transition field value can be used with only one transition state in a process. For upsert operations, the value in the &lt;State&gt; element must match an existing picklist value in the Status field for the record type.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:State&gt;Deferred&lt;/data:State&gt; . . . &lt;/data:TransitionState&gt;</pre>
<p>&lt;Category&gt; contains the name of the sales category that the transition state is associated with.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:Category&gt;Software&lt;/data:Category&gt; . . . &lt;/data:TransitionState&gt;</pre>
<p>&lt;Description&gt; contains a description of the transition state.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:Description&gt;Test &lt;/data:Description&gt; . . . &lt;/data:TransitionState&gt;</pre>
<p>&lt;Condition&gt; contains a condition that determines whether a record can move to the transition state.</p> <p><b>Note:</b> Do not use any calculated fields in the expression. Calculated fields are not supported in expressions in the Condition field on transition states.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:Condition&gt;[ {Priority} ]="3-Low" &lt;/data:Condition&gt; . . . &lt;/data:TransitionState&gt;</pre>
<p>&lt;ErrorMessage&gt; contains the text for the error message that appears if the condition that is set up for the transition state is not met when a user tries to move a record of the record type specified in the process to the transition state.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:ErrorMessage&gt; &lt;/data:ErrorMessage&gt; . . . &lt;/data:TransitionState&gt;</pre>
<p>&lt;DisableUpdate&gt; determines whether a record can be updated when the record is in this state (false). If this element is set to true, then users, including external applications, cannot update records of the record type specified in the process when the records are in the transition state.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:DisableUpdate&gt;&gt;true &lt;/data:DisableUpdate&gt; . . . &lt;/data:TransitionState&gt;</pre>
<p>&lt;DisableDeleteOrRemove&gt; determines whether a record can be deleted when the record is in this state (false). If this element is set to true, then users, including external applications, cannot delete records of the record type specified in the process while the records are in the transition state.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:DisableDeleteOrRemove&gt;&gt;true &lt;/data:DisableDeleteOrRemove&gt; &lt;/data:TransitionState&gt;</pre>

Description	Element or Section
The <ListofFieldSetup> section contains details of the field configuration for the transition state.	<pre> &lt;data:TransitionState&gt; . . . &lt;data:ListofFieldSetup&gt; . . . &lt;/data:ListofFieldSetup&gt; &lt;/data:TransitionState&gt; </pre>
The <FieldSetup> section contains details of the configuration for a single field.	<pre> &lt;data:TransitionState&gt; . . . &lt;data:ListofFieldSetup&gt; &lt;data:FieldSetup&gt; . . . &lt;/data:FieldSetup&gt; &lt;/data:ListofFieldSetup&gt; &lt;/data:TransitionState&gt; </pre>
<FieldName> contains the system name of the field, which never changes.	<pre> &lt;data:TransitionState&gt; . . . &lt;data:ListofFieldSetup&gt; &lt;data:FieldSetup&gt; &lt;data:FieldName&gt;Account Name &lt;/data:Fieldname&gt; . . . &lt;/data:FieldSetup&gt; &lt;/data:ListofFieldSetup&gt; &lt;/data:TransitionState&gt; </pre>
<ReadOnly> determines if the field becomes read-only (true) or does not become read-only (false) when the record is in this transition state.	<pre> &lt;data:TransitionState&gt; . . . &lt;data:ListofFieldSetup&gt; &lt;data:FieldSetup&gt; . . . &lt;data:ReadOnly&gt;&gt;true &lt;/data:ReadOnly&gt; &lt;/data:FieldSetup&gt; &lt;/data:ListofFieldSetup&gt; &lt;/data:TransitionState&gt; </pre>
The <ListofRelatedAccessControl> section contains details of the access controls that are configured on the transition state for the related record types.	<pre> &lt;data:TransitionState&gt; . . . &lt;data:ListofRelatedAccessControl&gt; . . . &lt;/data:ListofRelatedAccessControl&gt; &lt;/data:TransitionState&gt; </pre>
The <RelatedAccessControl> section contains details of the access controls for a single related record type.	<pre> &lt;data:TransitionState&gt; . . . &lt;data:ListofRelatedAccessControl&gt; &lt;data:RelatedAccessControl&gt; . . . &lt;/data:RelatedAccessControl&gt; &lt;/data:ListofRelatedAccessControl&gt; &lt;/data:TransitionState&gt; </pre>
<RecordType> contains the access object name of the related record type.	<pre> &lt;data:TransitionState&gt; . . . &lt;data:ListofRelatedAccessControl&gt; </pre>

Description	Element or Section
<p>For information about access object names and their corresponding display names, see <a href="#">Access Objects</a>.</p>	<pre>&lt;data:RelatedAccessControl&gt; &lt;data:RecordType&gt;Activity Book &lt;/data:RecordType&gt; . . . &lt;/data:RelatedAccessControl&gt; &lt;/data:ListofRelatedAccessControl&gt; &lt;/data:TransitionState&gt;</pre>
<p>&lt;DisableCreateOrAdd&gt; determines whether new or existing records of the specified related record type can be linked to the parent record while the parent record is in this transition state (false). If this element is set to true, then users, including external applications, cannot link existing records of the specified related record type or add new records of that type to the parent record while the parent record is in this state.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:ListofRelatedAccessControl&gt; &lt;data:RelatedAccessControl&gt; . . . &lt;data:DisableCreateOrAdd&gt;true &lt;/data:DisableCreateOrAdd&gt; . . . &lt;/data:RelatedAccessControl&gt; &lt;/data:ListofRelatedAccessControl&gt; &lt;/data:TransitionState&gt;</pre>
<p>&lt;DisableUpdate&gt; determines whether a record of the specified related record type that is linked to a parent record can be updated while the parent record is in this transition state (false). If this element is set to true, then users, including external applications, cannot update records of the specified related record type that are linked to the parent record while the parent record is in this state.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:ListofRelatedAccessControl&gt; &lt;data:RelatedAccessControl&gt; . . . &lt;data:DisableUpdate&gt;true &lt;/data:DisableUpdate&gt; . . . &lt;/data:RelatedAccessControl&gt; &lt;/data:ListofRelatedAccessControl&gt; &lt;/data:TransitionState&gt;</pre>
<p>&lt;DisableDeleteOrRemove&gt; determines whether a related record can be deleted or unlinked from the parent record when the parent record is in this state (false). If this element is set to true, then users, including external applications, cannot delete records of the specified related record type while the parent record is in this state.</p>	<pre>&lt;data:TransitionState&gt; . . . &lt;data:ListofRelatedAccessControl&gt; &lt;data:RelatedAccessControl&gt; . . . &lt;data:DisableDeleteOrRemove&gt;&gt;false &lt;/data:DisableDeleteOrRemove&gt; &lt;/data:RelatedAccessControl&gt; &lt;/data:ListofRelatedAccessControl&gt; &lt;/data:TransitionState&gt;</pre>

## Migrating Process Administration Configuration Data

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate process administration configuration data:

- [Extracting a Process for a Single Object](#)
- [Extracting Processes for All Objects](#)
- [Updating or Inserting a Process \(Upsert\)](#)

**Note:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

## Extracting a Process for a Single Object

This topic describes how to extract a process for a single object from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follow:

```
.../repository/ProcessAdministration/RecordType.xml
```

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the process for a single object:

```
migrationtool -u UserID -s ServerURL Read ProcessAdministration SystemNameOfObject [ProcessName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract the process, for example, Account. The system names for the record types are listed in [System Names for Record Types](#). If you specify a process name in the command, then you do not need to specify a record type, but you must include an empty value for the *SystemNameOfObject* parameter. An empty value is specified as a set of double quotation marks ("").
- *ProcessName* is the name of the process that you want to extract. This parameter is optional if you specify a record type in the command.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Process for a Single Object

The following is an example of extracting a single process for a single object:

```
migrationtool -u UserID -s ServerURL Read ProcessAdministration Account "My Account Process"
```

**Note:** If the object name contains spaces, then it must be enclosed with quotation marks. Similarly, if the process name contains spaces, then it must be enclosed with quotation marks.

## Extracting Processes for All Objects

This topic describes how to extract the processes for all objects from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the processes for all objects:

```
migrationtool -u UserID -s ServerURL ReadAll ProcessAdministration
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting a Process (Upsert)

This topic describes how to update a process (if it exists) or insert a process (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The `upsert` command inserts or updates a process based on the user key: RecordType.

Oracle CRM On Demand attempts to locate the process specified in the input file based on the user key. If a process exists for the specified record type, then the process is updated. If a process does not exist for the specified record type, then a new process is created for that record type.

The `upsert` command inserts or updates a process transition state based on the user key: State.

Oracle CRM On Demand attempts to locate a process transition state in the input file based on the user key. If a match is located, then the transition state is updated. If Oracle CRM On Demand cannot locate a transition state based on the user key, then a new transition state is created for the process for the record type.

**Note:** The `Read ProcessAdministration` and `ReadAll ProcessAdministration` commands do not extract the field setup and related access control configuration data for transition states, and the `Upsert ProcessAdministration` command does not insert or update this configuration data. So, if you extract a process that has field setup and related access control configuration data, and if you then insert the extracted process in a different environment, then no field setup and related access control configuration data is inserted for the process. However, if the process already exists in the target environment, and if you update the process, then any existing field setup and related access control configuration data on the process remains unchanged.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update a process for an object:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministration ProcessXML
```



where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ProcessXML* is the fully qualified path name of the process administration XML file, for example:

```
C:\My Files\Account.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministration "C:\My Files\Account.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a Process

The following is an example of updating a process (if it exists) or inserting the process (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministration "C:\Oracle Migration Tool On Demand  
\windows\repository\ProcessAdministration\Account.xml"
```

**Note:** Quotation marks are required only if the fully qualified path name contains spaces.

# Migrating Process Administration Transition States

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate process administration transition states:

- *Extracting a Single Transition State or All Transition States for a Process*
- *Extracting All Transition States*
- *Updating or Inserting a Transition State (Upsert)*
- *Deleting a Transition State*

## Extracting a Single Transition State or All Transition States for a Process

This topic describes how to extract a single transition state or all of the transition states for a process from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment. The output from the extract is saved to a file and directory as follows:

```
.../repository/ProcessAdministrationTransitionState/RecordType
```

*TransitionState.xml*

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a single transition state or all of the transition states for a process:

```
migrationtool -u UserID -s ServerURL Read ProcessAdministrationTransitionState SystemNameOfObject  
[ProcessName] [StateName]
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) for which you want to extract the transition state, for example, Account. The system names for the record types are listed in [System Names for Record Types](#).
- *ProcessName* is the name of the process that you want to extract.
- *StateName* is the name of the transition state that you want to extract. If you do not specify a transition state, then all of the transition states for the specified process or record type are extracted.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting a Single Transition State

The following is an example of extracting a single transition state:

```
migrationtool -u UserID -s ServerURL Read ProcessAdministrationTransitionState Account "Account Process"  
Active
```

**Note:** If the name of a record type, process, or transition state contains spaces or special characters, then the name must be enclosed with quotation marks.

## Example of Extracting All Transition States for a Process

The following is an example of extracting all of the transition states for a process:

```
migrationtool -u UserID -s ServerURL Read ProcessAdministrationTransitionState Account "Account Process"
```

**Note:** If the name of a record type or process contains spaces or special characters, then the name must be enclosed with quotation marks.

## Extracting All Transition States

This topic describes how to extract the transition states for all processes from the Oracle CRM On Demand server for your environment; that is, a customer test environment or production environment.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the transition states for all processes:

```
migrationtool -u UserID -s ServerURL ReadAll ProcessAdministrationTransitionState
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting a Transition State (Upsert)

This topic describes how to update a transition state (if it exists) or insert a transition state (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The `upsert` command inserts or updates a transition state based on the following user key:

- RecordType and ProcessName and State

The value in the `<State>` element must match an existing picklist value in the Status field for the record type.

Oracle CRM On Demand attempts to locate the transition state specified in the input file based on the user key. If the transition state exists for the specified record type and process, then the transition state is updated. If the transition state does not exist for the specified record type and process, then a new transition state is created on the process for the record type. Existing field setup and related access control configurations are updated, but any field setup and related access control configurations that are not identified in the input XML file are not deleted.

The `upsert` command inserts or updates field setup configurations based on the user key: `FieldName`.

The `upsert` command inserts or updates related access control configurations based on the user key: `RecordType` (the access object name of a related record type).

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update a transition state for an object:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministrationTransitionState TransitionStateXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *TransitionStateXML* is the fully qualified path name of transition state XML file, for example:

```
C:\My Files\Assigned.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministrationTransitionState "C:\My Files  
\Assigned.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a Transition State

The following is an example of updating a transition state (if it exists) or inserting the transition state (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert ProcessAdministrationTransitionState "C:\Oracle Migration Tool  
On Demand\windows\repository\ProcessAdministrationTransitionState\Assigned.xml"
```

**Note:** Quotation marks are required only if the fully qualified path name contains spaces.

## Deleting a Transition State

This topic describes how to delete a transition state from your Oracle CRM On Demand server for your environment (customer test environment or production).

### About the Delete Operation

The `Delete` command deletes a transition state and all of the field setup and related access control configurations for the transition state.

You cannot use the `Delete` command to delete the field setup or the related access control configuration on a transition state without deleting the transition state itself. If you deleted the field setup or the related access control configuration from a transition state in the source environment after you migrated the transition state to a target environment, and you want to delete the corresponding configuration data from the transition state in the target environment, then you must delete the transition state from the target environment and extract and upload the transition state data from the source environment again.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to delete a transition state:

```
migrationtool -u UserID -s ServerURL Delete ProcessAdministrationTransitionState SystemNameOfObject  
[ProcessName] StateName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SystemNameOfObject* is the system name of the object (record type) from which you want to delete the transition state, for example, Account. The system names for the record types are listed in [System Names for Record Types](#).
- *ProcessName* is the name of the process from which you want to delete the transition state.
- *StateName* is the name of the transition state that you want to delete.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Deleting a Transition State

The following is an example of deleting a transition state:

```
migrationtool -u UserID -s ServerURL Delete ProcessAdministrationTransitionState Account "Account Process"  
Active
```

**Note:** If the name of the record type, process, or transition state contains spaces, then the name must be enclosed with quotation marks.



# 32 Migrating Lead Conversion Mapping Data

## Migrating Lead Conversion Mapping Data

This chapter describes how to migrate lead conversion mapping data using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Lead Conversion Mapping Data](#)
- [Privileges Required for Migrating Lead Conversion Mapping Data](#)
- [Elements and Sections in the Lead Conversion Mapping XML Output File](#)
- [Migrating Lead Conversion Mapping Data](#)

## Lead Conversion Mapping Data

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records. In the standard application, some information from the lead record is carried over to the relevant fields in the account, contact, opportunity, and deal registration records that are created or linked to the lead during the conversion process. You can determine what information is carried over by configuring the mappings between the fields on the Lead record type and the Account, Contact, Deal Registration, and Opportunity record types.

The following table describes the Oracle Migration Tool On Demand client commands used with lead conversion mapping data.

Command	Description
<code>Read LeadConversionMapping LeadFieldName</code>	This command exports the lead conversion mapping data for a single field on the Lead record type. <i>LeadFieldName</i> is the system name of the lead field for which you want to export the lead conversion mapping data.
<code>ReadAll LeadConversionMapping</code>	This command exports the lead conversion mapping data for all of the fields on the Lead record type.
<code>Upsert LeadConversionMapping LeadConversionMappingXML</code>	This command updates or inserts the lead conversion mapping data specified in the XML file.

## Privileges Required for Migrating Lead Conversion Mapping Data

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `Read` and `ReadAll` commands: Enable Web Services Access, and Data Rules and Assignment. To extract mappings for the Deal Registration record type, the Manage PRM Access privilege is also required.
- For the `Upsert` command: Enable Web Services Access, and Data Rules and Assignment. To insert or update mappings for the Deal Registration record type, the Manage PRM Access privilege is also required.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Lead Conversion Mapping XML Output File

The following table describes the elements and sections in the lead conversion mapping XML output file.

Description	Element or Section
The <code>&lt;FieldMapping&gt;</code> section contains the details of the mappings for a single field on the Lead record type.	<code>&lt;data:FieldMapping&gt;</code> . . . <code>&lt;/data:FieldMapping&gt;</code>
<code>&lt;LeadFieldName&gt;</code> contains the system name of a field on the Lead record type.	<code>&lt;data:FieldMapping&gt;</code> <code>&lt;data:LeadFieldName&gt;TEXTSM_001&lt;/data:LeadFieldName&gt;</code> . . . <code>&lt;/data:FieldMapping&gt;</code>
<code>&lt;ContactFieldName&gt;</code> contains the system name of the field on the Contact record type that the field on the Lead record type is mapped to, if a mapping exists.	<code>&lt;data:FieldMapping&gt;</code> . . . <code>&lt;data:ContactFieldName&gt;TEXTSM_001&lt;/data:ContactFieldName&gt;</code> . . . <code>&lt;/data:FieldMapping&gt;</code>
<code>&lt;OpportunityFieldName&gt;</code> contains the system name of the field on the Opportunity record type that the field on the Lead record type is mapped to, if a mapping exists.	<code>&lt;data:FieldMapping&gt;</code> . . . <code>&lt;data:OpportunityFieldName&gt;TEXTSM_001&lt;/data:OpportunityFieldName&gt;</code> . . . <code>&lt;/data:FieldMapping&gt;</code>
<code>&lt;AccountFieldName&gt;</code> contains the system name of the field on the Account record	<code>&lt;data:FieldMapping&gt;</code> . . . <code>&lt;data:AccountFieldName&gt;TEXTSM_01&lt;/data:AccountFieldName&gt;</code>



Description	Element or Section
type that the field on the Lead record type is mapped to, if a mapping exists.	<code>&lt;/data:FieldMapping&gt;</code>
<DealRegistrationFieldName> contains the system name of the field on the Deal Registration record type that the field on the Lead record type is mapped to, if a mapping exists.	<pre> &lt;data:FieldMapping&gt; . . . &lt;data:DealRegistrationFieldName&gt;TEXTSM_01&lt;/data:DealRegistrationFieldName&gt; &lt;/data:FieldMapping&gt;                     </pre>

## Migrating Lead Conversion Mapping Data

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate lead conversion mapping data:

- [Extracting Lead Conversion Mapping Data for a Single Field](#)
- [Extracting All Lead Conversion Mapping Data](#)
- [Updating or Inserting Lead Conversion Mapping Data](#)

**Note:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting Lead Conversion Mapping Data for a Single Field

This topic describes how to extract the lead conversion mappings for a single field on the Lead record type from your Oracle CRM On Demand environment. To extract mappings for the Deal Registration record type, the Manage PRM Access privilege is also required.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract the lead conversion mappings for a single field on the Lead record type:

```
migrationtool -u UserID -s ServerURL Read LeadConversionMapping LeadFieldName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *LeadFieldName* is the system name of the field on the Lead record type.

The output XML file is named with the name of the field on the Lead record type.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting the Lead Conversion Mapping Data for a Single Field on the Lead Record Type

The following is an example of extracting the lead conversion mappings for the Email field on the Lead record type.

```
migrationtool -u UserID -s ServerURL Read LeadConversionMapping Email
```

**Note:** If the name of the field contains spaces, then it must be enclosed with quotation marks.

## Extracting All Lead Conversion Mapping Data

This topic describes how to extract the lead conversion mappings between the fields on the Lead record type and the fields on the Account, Contact, Deal Registration, and Opportunity record types from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all of the lead conversion mappings between the fields on the Lead record type and the fields on the Account, Contact, Deal Registration, and Opportunity record types:

```
migrationtool -u UserID -s ServerURL ReadAll LeadConversionMapping
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

Each of the output XML files is named with the name of the field on the Lead record type. If no mapping exists for a field on the Lead record type, then no data is extracted for that field.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting Lead Conversion Mapping Data

This topic describes how to update the lead conversion mappings between one or more fields on the Lead record type and the fields on another record type (if any mappings exist) or insert the lead conversion mappings (if none exist) on your Oracle CRM On Demand environment (customer test environment or production).

## About the Upsert Operation

The `Upsert` command inserts or updates lead conversion mappings based on the user key: Field Name.

Oracle CRM On Demand attempts to locate the lead conversion mappings specified in the input file based on the user key. If a match is located, then the lead conversion mappings are updated. If the system name is blank for a field on a record type (for example, the Contact record type) in the XML input file, and if the field on the Lead record type was previously mapped to a field on that record type, then the mapping is deleted. If Oracle CRM On Demand cannot locate any existing mapping for the field on the Lead record type, then the mapping is created for the first time.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update lead conversion mappings:

```
migrationtool -u UserID -s ServerURL Upsert LeadConversionMapping LeadConversionMappingXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *LeadConversionMappingXML* is the fully qualified path name of the lead conversion mappings XML file, for example:

```
C:\My Files\Date of Birth.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert LeadConversionMapping "C:\My Files\Date of Birth.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting Lead Conversion Mapping Data

The following is an example of updating lead conversion mappings (if any exist) or inserting the lead conversion mapping data (if none exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert LeadConversionMapping "C:\Oracle Migration Tool On Demand\nwindows\repository\LeadConversionMapping\Company.xml"
```

**Note:** Quotation marks are required only if the fully qualified path name contains spaces.



# 33 Migrating Sales Processes

## Migrating Sales Processes

This chapter describes how to migrate sales processes using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Sales Processes](#)
- [Privileges Required for Migrating Sales Processes](#)
- [Elements and Sections in the Sales Process XML Output File](#)
- [Migrating Sales Processes](#)

## Sales Processes

A *sales process* is a series of steps that defines a sales methodology for your company. The following table describes the Oracle Migration Tool On Demand client commands used with sales processes. These commands are case sensitive.

Command	Description
<code>Read SalesProcess BaseName</code>	This command exports a single sales process. <i>BaseName</i> is the language-independent name of the sales process. If the language-independent name contains any spaces or special characters, such as brackets, then it must be enclosed with quotation marks.
<code>ReadAll SalesProcess</code>	This command exports all sales processes in the Oracle CRM On Demand tenant.
<code>Upsert SalesProcess SalesProcessXML</code>	This command updates or inserts the sales process specified in the XML file.

## Privileges Required for Migrating Sales Processes

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `Read` and `ReadAll` commands: Enable Web Services Access.
- For the `Upsert` command: Enable Web Services Access, and Manage Data Rules - Manage Sales Stage Definition.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

# Elements and Sections in the Sales Process XML Output File

The following table describes the elements and sections in the sales process XML output file.

**Note:** When a sales process is created, sales stages named Closed/Lost and Closed/Won are automatically associated with the sales process. The Probability field on the Closed/Lost sales stage is set to zero (0), and the Probability field on the Closed/Won sales stage is set to 100. You cannot change these values. Do not set up any other sales stage with the Probability field equal to 0 or 100 percent. Modifying picklists that are used internally by the Oracle CRM On Demand application can have an adverse impact on standard functionality. You cannot remove the Closed/Lost and Closed/Won sales stages from a sales process.

Description	Element or Section
The <SalesProcess> section contains all of the information for a single sales process.	<pre>&lt;data:SalesProcess&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<Name> is the name of the sales process.	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:Name&gt;High Potential&lt;/data:Name&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<Translate> specifies whether the sales process is marked for translation.	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:Translate&gt;N&lt;/data:Translate&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<Default> specifies whether this is the default sales process.	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:Default&gt;&gt;true&lt;/data:Default&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<Description> contains a description of the sales process.	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:Description&gt;&lt;/data:Description&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<TranslationLanguage> is the three-letter code for the language.	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:TranslationLanguage&gt;ENU&lt;/data:TranslationLanguage&gt; . . . &lt;/data:SalesProcess&gt;</pre>

Description	Element or Section
<p>&lt;BaseName&gt; is the language-independent name of the sales process.</p>	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:BaseName&gt;[High Potential]&lt;/data:BaseName&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<p>The &lt;ListOfOpportunityType&gt; section contains the information for the opportunity types associated with the sales process.</p>	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:ListOfOpportunityType&gt; . . . &lt;/data:ListOfOpportunityType&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<p>The &lt;Type&gt; element in the &lt;OpportunityType&gt; section contains the name of an opportunity type associated with the sales process.</p>	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:ListOfOpportunityType&gt; &lt;data:OpportunityType&gt; &lt;data:Type&gt;Renewal&lt;/data:Type&gt; &lt;/data:OpportunityType&gt; &lt;/data:ListOfOpportunityType&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<p>The &lt;ListOfSalesStage&gt; section contains the information for the sales stages associated with the sales process.</p>	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:ListOfSalesStage&gt; . . . &lt;/data:ListOfSalesStage&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<p>The &lt;SalesStage&gt; section contains all of the information for a single sales stage associated with the sales process, as follows:</p> <ul style="list-style-type: none"> <li>• &lt;Name&gt; is the name of the sales stage.</li> <li>• &lt;SalesCategoryName&gt; is the category that the sales stage falls under.</li> <li>• &lt;Order&gt; indicates the sequence of the sales stage as it appears in the picklist.</li> <li>• &lt;Probability&gt; is the default probability for the sales stage.</li> <li>• &lt;Description&gt; is the description of the sales stage.</li> <li>• &lt;TranslationLanguage&gt; is the three-letter code for the language for the sales stage.</li> <li>• &lt;BaseName&gt; is the language-independent name of the sales stage.</li> </ul>	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:ListOfSalesStage&gt; &lt;data:SalesStage&gt; . . . &lt;data:Name&gt;Short List&lt;data:Name&gt; &lt;data:SalesCategoryName&gt;Leads Category&lt;/data:SalesCategoryName&gt; &lt;data:Order&gt;1&lt;/data:Order&gt; &lt;data:Probability&gt;30&lt;/data:Probability&gt; &lt;data:Description&gt;Looking for the Right Characteristics&lt;/data:Description&gt; &lt;data:TranslationLanguage&gt;ENU&lt;/data:TranslationLanguage&gt; &lt;data:BaseName&gt;Short List&lt;/data:BaseName&gt; &lt;data:BaseCategoryName&gt;Leads Category&lt;/data:BaseCategoryName&gt; &lt;/data:SalesStage&gt; . . . &lt;/data:ListOfSalesStage&gt; . . . &lt;/data:SalesProcess&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;BaseCategoryName&gt; is the language-independent name of the sales category that the sales stage falls under.</li> </ul>	
<p>The &lt;ListOfTranslation&gt; section contains the translation values for the sales process.</p>	<pre>&lt;data:SalesProcess&gt; . . . &lt;data:ListOfTranslation&gt; . . . &lt;/data:ListOfTranslation&gt; . . . &lt;/data:SalesProcess&gt;</pre>
<p>The &lt;Translation&gt; section contains the translation values for one language:</p> <ul style="list-style-type: none"> <li>• &lt;LanguageId&gt; contains the three-letter code for the translation language. For the list of language codes, see <a href="#">Language Codes and Their Corresponding Language and Country</a>.</li> <li>• &lt;Name&gt; contains the name for the sales process in the language identified by the language code.</li> <li>• &lt;Description&gt; contains the description of the sales process in the language identified by the language code.</li> </ul>	<pre>&lt;data:SalesProcess&gt; &lt;data:ListOfTranslation&gt; &lt;data:Translation&gt; &lt;data:LanguageId&gt;ENU&lt;/data:LanguageId&gt; &lt;data:Name&gt;High Potential&lt;/data:Name&gt; &lt;data:Description&gt;Looking for the Right Characteristics&lt;/data:Description&gt; &lt;/data:Translation&gt; . . . &lt;/data:ListOfTranslation&gt; &lt;/data:SalesProcess&gt;</pre>

## Migrating Sales Processes

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate sales processes:

- [Extracting a Single Sales Process](#)
- [Extracting All Sales Processes](#)
- [Updating or Inserting a Sales Process](#)

**Note:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Single Sales Process

This topic describes how to extract a single sales process from your Oracle CRM On Demand environment.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a sales process:



```
migrationtool -u UserID -s ServerURL Read SalesProcess BaseName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *BaseName* is the language-independent name of the sales process.

If the language-independent name of the sales process contains any spaces or special characters, such as brackets, then it must be enclosed with quotation marks.

The output XML file is named with the language-independent name of the sales process.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Extracting a Single Sales Process

The following is an example of extracting a sales process named High Potential:

```
migrationtool -u UserID -s ServerURL Read SalesProcess "[High Potential]"
```

## Extracting All Sales Processes

This topic describes how to extract all of the sales processes from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all of the sales processes:

```
migrationtool -u UserID -s ServerURL ReadAll SalesProcess
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting a Sales Process

This topic describes how to update a sales process (if it exists) or insert a sales process (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The `upsert` command inserts or updates sales processes based on the user key: `BaseName`, which is the language-independent name of the sales process.

Oracle CRM On Demand attempts to locate the sales process specified in the input file based on the user key. If a match is located, then the sales process is updated. If Oracle CRM On Demand cannot locate a sales process based on the user key, then a new sales process is created.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update a sales process:

```
migrationtool -u UserID -s ServerURL Upsert SalesProcess SalesProcessXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SalesProcessXML* is the fully qualified path name of the sales process XML file, for example:

```
C:\My Files\[High Potential].xml
```

If the fully qualified path name contains any spaces or special characters, such as brackets, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert SalesProcess "C:\My Files\[High Potential].xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Updating or Inserting a Sales Process

The following is an example of updating a sales process (if it exists) or inserting the sales process (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert SalesProcess "C:\Oracle Migration Tool On Demand\windows\nrepository\SalesProcess\[High Potential].xml"
```

# 34 Migrating Sales Stages

## Migrating Sales Stages

This chapter describes how to migrate sales stages using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Sales Stages](#)
- [Privileges Required for Migrating Sales Stages](#)
- [Elements and Sections in the Sales Stage XML Output File](#)
- [Migrating Sales Stages](#)

## Sales Stages

A *sales stage* is a step in a sales process. The following table describes the Oracle Migration Tool On Demand client commands used with sales stages. These commands are case sensitive.

Command	Description
<code>Read SalesStage <i>BaseName</i> [<i>SalesProcessBaseName</i>]</code>	<p>This command exports a single sales stage, if the optional <i>SalesProcessBaseName</i> parameter is specified together with the <i>BaseName</i> parameter. If <i>SalesProcessBaseName</i> is not specified, then multiple sales stages might be exported.</p> <p><i>BaseName</i> is the language-independent name of the sales stage. If the language-independent name contains any spaces or special characters, such as brackets, then it must be enclosed with quotation marks.</p> <p><i>SalesProcessBaseName</i> is the language-independent name of the sales process that the sales stage is associated with. If the language-independent name contains any spaces or special characters, such as brackets, then it must be enclosed with quotation marks.</p> <p>The <i>SalesProcessBaseName</i> parameter is optional. However, if you do not specify it, and if there is more than one sales stage with the same name (associated with different sales processes), then all of the sales stages with the specified name are exported. You can use the ReadAll SalesProcess command to extract the language-independent names of the sales processes. For more information, see <a href="#">Migrating Sales Processes</a>.</p>
<code>ReadAll SalesStage</code>	This command exports all sales stages in the Oracle CRM On Demand tenant.
<code>Upsert SalesStage <i>SalesStageXML</i></code>	This command updates or inserts the sales stage specified in the XML file.

## Privileges Required for Migrating Sales Stages

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `Read` and `ReadAll` commands: Enable Web Services Access.
- For the `Upsert` commands: Enable Web Services Access, and Manage Data Rules - Manage Sales Stage Definition.

For information about setting and checking privileges, see *Oracle CRM On Demand Online Help*.

## Elements and Sections in the Sales Stage XML Output File

The following table describes the elements and sections in the sales stage XML output file.

**Note:** Sales stages named Closed/Lost and Closed/Won are automatically associated with each sales process. The Probability field on the Closed/Lost sales stage is set to zero (0), and the Probability field on the Closed/Won sales stage is set to 100. You cannot change these values. Do not set up any other sales stage with the Probability field equal to 0 or 100 percent. Modifying picklists that are used internally by the Oracle CRM On Demand application can have an adverse impact on standard functionality.

Description	Element or Section
<p>The &lt;SalesStage&gt; section contains all of the information for a single sales stage:</p> <ul style="list-style-type: none"> <li>• &lt;SalesCategoryName&gt; contains the name of the sales category that the sales stage is associated with.</li> <li>• &lt;SalesCategoryBaseName&gt; contains the language-independent name of the sales category that the sales stage is associated with.</li> <li>• &lt;Probability&gt; contains the default probability for the sales stage.</li> <li>• &lt;SalesProcessBaseName&gt; contains the language-independent name of the sales process that the sales stage is associated with.</li> <li>• &lt;BaseName&gt; contains the language-independent name of the sales stage.</li> <li>• &lt;Name&gt; contains the name of the sales stage.</li> </ul>	<pre> &lt;data:SalesStage&gt;   &lt;data:SalesCategoryName&gt;Leads Category&lt;/data:SalesCategoryName&gt;   &lt;data:SalesCategoryBaseName&gt;Leads Category&lt;/data:SalesCategoryBaseName&gt;   &lt;data:Probability&gt;30&lt;/data:Probability&gt;   &lt;data:SalesProcessBaseName&gt;High Potential&lt;/data:SalesProcessBaseName&gt;   &lt;data:BaseName&gt;Short List&lt;/data:BaseName&gt;   &lt;data:Name&gt;Short List&lt;/data:Name&gt;   &lt;data:Description&gt;Looking for the Right Characteristics&lt;/data:Description&gt;   &lt;data:Order&gt;1&lt;/data:Order&gt;   &lt;data:Status&gt;Open&lt;/data:Status&gt;   &lt;data:BaseDescription&gt;Looking for the Right Characteristics &lt;/data:BaseDescription&gt;   &lt;data:Language&gt;ENU&lt;/data:Language&gt;   &lt;data:SalesProcessName&gt;High Potential&lt;/data:SalesProcessName&gt;   . . . &lt;/data:SalesStage&gt; </pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;Description&gt; contains the description of the sales stage.</li> <li>• &lt;Order&gt; indicates the sequence of the sales stage as it appears in the picklist.</li> <li>• &lt;Status&gt; contains the status of the sales stage.</li> <li>• &lt;BaseDescription&gt; contains the language-independent description of the sales stage.</li> <li>• &lt;Language&gt; contains the three-letter code for the language.</li> <li>• &lt;SalesProcessName&gt; contains the name of the sales process that the sales stage is associated with.</li> </ul>	
<p>The &lt;ListOfProcessCoach&gt; section contains the details of the process coach steps.</p>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfProcessCoach&gt; . . . &lt;/data:ListOfProcessCoach&gt; . . . &lt;/data:SalesStage&gt;</pre>
<p>The &lt;ProcessCoach&gt; section contains the details of a single process coach step:</p> <ul style="list-style-type: none"> <li>• &lt;BaseTitle&gt; contains the language-independent title of the process coach step.</li> <li>• &lt;Order&gt; contains the sequence of the process coach step as it appears in the picklist.</li> <li>• &lt;BaseDescription&gt; contains the language-independent description of the process coach step.</li> <li>• &lt;Language&gt; contains the three-letter code for the language.</li> <li>• &lt;Title&gt; contains the title of the process coach step.</li> <li>• &lt;Description&gt; contains the description of the process coach step.</li> <li>• &lt;StepName&gt; contains the name of the process coach step.</li> </ul>	<pre>&lt;data:SalesStage&gt; &lt;data:ListOfProcessCoach&gt; &lt;data:ProcessCoach&gt; &lt;data:BaseTitle&gt;&lt;/data:BaseTitle&gt; &lt;data:Order&gt;1&lt;/data:Order&gt; &lt;data:BaseDescription&gt;Send first letter to the opportunity&lt;/ data:BaseDescription&gt; &lt;data:Language&gt;ENU&lt;/data:Language&gt; &lt;data:Title&gt;&lt;/data:Title&gt; &lt;data:Description&gt;Send first letter to the opportunity&lt;/data:Description&gt; &lt;data:StepName&gt;Step 1&lt;/data:StepName&gt; &lt;/data:ProcessCoach&gt; . . . &lt;/data:ListOfProcessCoach&gt; . . . &lt;/data:SalesStage&gt;</pre>
<p>The &lt;ListOfAutomatedTask&gt; section contains the details of the automated tasks associated with sales stage.</p>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfAutomatedTask&gt; . . . &lt;/data:ListOfAutomatedTask&gt; . . . &lt;/data:SalesStage&gt;</pre>

Description	Element or Section
<p>The &lt;AutomatedTask&gt; element contains the details of a single automated task. There is a child element for each field that is available to be added to a task Detail page, including custom fields. For information about the task fields, see <i>Oracle Web Services On Demand Guide</i>.</p>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfAutomatedTask&gt; &lt;data:AutomatedTask&gt; . . . &lt;/data:AutomatedTask&gt; . . . &lt;/data:ListOfAutomatedTask&gt; . . . &lt;/data:SalesStage&gt;</pre>
<p>The &lt;ListOfTranslation&gt; section contains the translation values for the sales stage for each language activated for your company.</p>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfTranslation&gt; . . . &lt;/data:ListOfTranslation&gt; &lt;/data:SalesStage&gt;</pre>
<p>The &lt;Translation&gt; section contains the translation of the sales stage for one language:</p> <ul style="list-style-type: none"> <li>&lt;Description&gt; contains the translated description of the sales stage in the language identified by the language code.</li> <li>&lt;Language&gt; contains the three-letter code for the translation language.</li> <li>&lt;Name&gt; contains the translation of the name of the sales stage in the language identified by the language code.</li> </ul>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfTranslation&gt; &lt;data:Translation&gt; &lt;data:Description&gt;&lt;/data:Description&gt; &lt;data:Language&gt;&lt;/data:Language&gt; &lt;data:Name&gt;&lt;/data:Name&gt; &lt;/data:Translation&gt; . . . &lt;/data:ListOfTranslation&gt; &lt;/data:SalesStage&gt;</pre>
<p>The &lt;ListOfProcessCoachTranslation&gt; section contains the translation values for the process coach step for each language activated for your company.</p>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfProcessCoachTranslation&gt; . . . &lt;/data:ListOfProcessCoachTranslation&gt; . . . &lt;/data:SalesStage&gt;</pre>
<p>The &lt;ProcessCoachTranslation&gt; section contains the translation of the process coach step for one language:</p> <ul style="list-style-type: none"> <li>&lt;Language&gt; contains the three-letter code for the translation language.</li> <li>&lt;Title&gt; contains the title of the process coach step in the language identified by the language code.</li> <li>&lt;Instruction&gt; contains the description of the process coach step in the language identified by the language code.</li> </ul>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfProcessCoachTranslation&gt; &lt;data:ProcessCoachTranslation&gt; &lt;data:Language&gt;ENU&lt;/data:Language&gt; &lt;data:Title&gt;Short List&lt;/data:Title&gt; &lt;data:Instruction&gt;Send first letter to the opportunity&lt;/data:Instruction&gt; &lt;data:ProcessCoachName&gt;Step 1&lt;/data:ProcessCoachName&gt; . . . &lt;/data:ProcessCoachTranslation&gt; . . . &lt;/data:ListOfProcessCoachTranslation&gt; . . . &lt;/data:SalesStage&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;ProcessCoachName&gt; contains the translation of the name of the process coach step in the language identified by the language code.</li> </ul>	
<p>The &lt;ListOfAttachment&gt; section contains the details of the attachments associated with sales stage.</p>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfAttachment&gt; . . . &lt;/data:ListOfAttachment&gt; . . . &lt;/data:SalesStage&gt;</pre>
<p>The &lt;Attachment&gt; section contains the details of a single attachment:</p> <ul style="list-style-type: none"> <li>• &lt;AttachmentTag&gt; indicates whether the attachment is a file or a URL.</li> <li>• &lt;FileExtension&gt; contains the file extension of the attachment, if the attachment is a file.</li> <li>• &lt;DisplayFileName&gt; contains the display name for the attachment.</li> <li>• &lt;FileDate&gt; contains the date the file was uploaded, if the attachment is a file.</li> <li>• &lt;Description&gt; contains the description of the attachment.</li> <li>• &lt;FileSize&gt; contains the size of the file in KB, if the attachment is a file.</li> <li>• &lt;FileNameOrURL&gt; contains the name of the file or the URL string.</li> <li>• &lt;Attachment&gt; contains the content of the file, if the attachment is a file.</li> </ul> <p><b>Note:</b> When you extract sales stage information, the content of any attached files is included in the sales stage XML file, encoded as inline Base64 encoded data. For more information about file attachments, see <i>Oracle Web Services On Demand Guide</i>.</p>	<pre>&lt;data:SalesStage&gt; &lt;data:ListOfAttachment&gt; &lt;data:Attachment&gt; &lt;data:AttachmentTag&gt;URL&lt;/data:AttachmentTag&gt; &lt;data:FileExtension&gt;&lt;/data:FileExtension&gt; &lt;data:DisplayFileName&gt;Click here&lt;/data:DisplayFileName&gt; &lt;data:FileDate&gt;&lt;/data:FileDate&gt; &lt;data:Description&gt;&lt;/data:Description&gt; &lt;data:FileSize&gt;&lt;/data:StepName&gt; &lt;data:FileNameOrURL&gt;www.example.com&lt;/data:FileNameOrURL&gt; &lt;data:Attachment&gt;&lt;/data:Attachment&gt; &lt;/data:Attachment&gt; . . . &lt;/data:ListOfAttachment&gt; . . . &lt;/data:SalesStage&gt;</pre>
<p>The &lt;ListOfAutomatedTaskTranslation&gt; section contains the translation values for the automated tasks for each language activated for your company.</p>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfAutomatedTaskTranslation&gt; . . . &lt;/data:ListOfAutomatedTaskTranslation&gt; . . . &lt;/data:SalesStage&gt;</pre>
<p>The &lt;AutomatedTaskTranslation&gt; section contains the translation of the process coach step for one language:</p>	<pre>&lt;data:SalesStage&gt; . . . &lt;data:ListOfAutomatedTaskTranslation&gt;</pre>

Description	Element or Section
<ul style="list-style-type: none"> <li>• &lt;Subject&gt; contains the translation of the subject of the task in the language identified by the language code.</li> <li>• &lt;Language&gt; contains the three-letter code for the translation language.</li> <li>• &lt;TaskExternalSystemId&gt; contains the unique external ID of the task.</li> <li>• &lt;TaskIntegrationId&gt; contains the integration ID of the task.</li> <li>• &lt;Comments&gt; contains the translation of the description of the task in the language identified by the language code.</li> </ul>	<pre> &lt;data:AutomatedTaskTranslation&gt;   &lt;data:Subject&gt;&lt;/data:Subject&gt;   &lt;data:Language&gt;&lt;/data:Language&gt;   &lt;data:TaskExternalSystemId&gt;&lt;/data:TaskExternalSystemId&gt;   &lt;data:TaskIntegrationId&gt;&lt;/data:TaskIntegrationId&gt;   &lt;data:Comments&gt;&lt;/data:Comments&gt; &lt;/data:AutomatedTaskTranslation&gt; . . . &lt;/data:ListOfAutomatedTaskTranslation&gt; . . . &lt;/data:SalesStage&gt; </pre>
<p>The &lt;ListOfRequiredField&gt; section contains the details of the required fields for the sales stage.</p>	<pre> &lt;data:SalesStage&gt; . . .   &lt;data:ListOfRequiredField&gt; . . .   &lt;/data:ListOfRequiredField&gt; . . . &lt;/data:SalesStage&gt; </pre>
<p>The &lt;RequiredField&gt; section contains the details of a single required field:</p> <ul style="list-style-type: none"> <li>• &lt;DefaultValue&gt; contains the default value for the field.</li> <li>• &lt;FieldName&gt; contains the name of the field.</li> <li>• &lt;TagName&gt; contains the integration tag for the field.</li> </ul>	<pre> &lt;data:SalesStage&gt; . . .   &lt;data:ListOfRequiredField&gt;     &lt;data:RequiredField&gt;       &lt;data:DefaultValue&gt;Not specified&lt;/data:DefaultValue&gt;       &lt;data:FieldName&gt;Approver Alias&lt;/data:FieldName&gt;       &lt;data:TagName&gt;Approver&lt;/data:TagName&gt;     &lt;/data:RequiredField&gt; . . .   &lt;/data:ListOfRequiredField&gt; &lt;/data:SalesStage&gt; </pre>

## Migrating Sales Stages

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate sales stages:

- [Extracting a Single Sales Stage](#)
- [Extracting All Sales Stages](#)
- [Updating or Inserting a Sales Stage](#)

**Note:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.



## Extracting a Single Sales Stage

This topic describes how to extract a single sales stage from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a sales stage:

```
migrationtool -u UserID -s ServerURL Read SalesStage BaseName  
SalesProcessBaseName
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *BaseName* is the language-independent name of the sales stage.

If the language-independent name of the sales stage contains any spaces or special characters, such as brackets, then it must be enclosed with quotation marks.

- *SalesProcessBaseName* is the language-independent name of the sales process that the sales stage is associated with.

If the language-independent name of the sales process contains any spaces or special characters, such as brackets, then it must be enclosed with quotation marks.

The output XML file is named with the language-independent name of the sales stage, and it is saved in the following directory:

```
... \repository\SalesStage\SalesProcessBaseName
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### Example of Extracting a Single Sales Stage

The following is an example of extracting a sales stage named Short List:

```
migrationtool -u UserID -s ServerURL Read SalesStage "Short List" "[High Potential]"
```

## Extracting All Sales Stages

This topic describes how to extract all of the sales stages from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all of the sales stages:

```
migrationtool -u UserID -s ServerURL ReadAll SalesStage
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Updating or Inserting a Sales Stage

This topic describes how to update a sales stage (if it exists) or insert a sales stage (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The `upsert` command inserts or updates sales stages based on the user key: `BaseName` (the language-independent name of the sales stage) and `SalesProcessBaseName` (the language-independent name of the sales process).

Oracle CRM On Demand attempts to locate the sales stage specified in the input file based on the user key. If a match is located, then the sales stage is updated. If Oracle CRM On Demand cannot locate a sales stage based on the user key, then a new sales stage is created.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update a sales stage:

```
migrationtool -u UserID -s ServerURL Upsert SalesStage SalesStageXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *SalesStageXML* is the fully qualified path name of the sales stage XML file, for example:

```
C:\My Files\Short List.xml
```

If the fully qualified path name contains any spaces or special characters, such as brackets, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert SalesStage "C:\My Files\[High Potential]\Short List.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a Sales Stage

The following is an example of updating a sales stage (if it exists) or inserting the sales stage (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert SalesStage "C:\Oracle Migration Tool On Demand\windows  
\repository\SalesStage\[High Potential]\Short List.xml"
```



# 35 Migrating Client Side Extensions

## Migrating Client Side Extensions

This chapter describes how to migrate client side extensions using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- *Client Side Extensions*
- *Privileges Required for Migrating Client Side Extensions*
- *Elements and Sections in the Client Side Extensions XML Output File*
- *Migrating Client Side Extensions*

## Client Side Extensions

*Client side extensions* are files that you can upload to and host on Oracle Migration Tool On Demand client instead of hosting them on other servers. The following table describes the Oracle Migration Tool On Demand client commands used with client side extensions. These commands are case sensitive.

Command	Description
<b>Read ClientSideExtension</b> <i>ClientSideExtensionName</i>	This command exports a single client side extension. <i>ClientSideExtensionName</i> is the name of the client side extension.
<b>ReadAll ClientSideExtension</b>	This command exports all of the client side extensions in the Oracle CRM On Demand tenant.
<b>Upsert ClientSideExtension</b> <i>ClientSideExtensionXML</i>	<p>This command updates or inserts the client side extension specified in the XML file.</p> <p>Oracle CRM On Demand supports the following file types for client side extensions:</p> <ul style="list-style-type: none"> <li>• HTML</li> <li>• JPG</li> <li>• GIF</li> <li>• SWF</li> <li>• JavaScript</li> <li>• CSS</li> </ul>

## Privileges Required for Migrating Client Side Extensions

The following privileges are required for the user account running the Oracle Migration Tool On Demand client commands:

- For the `upload` command: Enable Web Services Access and Upload Client Side Extensions and Manage Custom HTML Head Tag.

Users can use the `read` and `readAll` commands to extract client side extensions even if they do not have the Enable Web Services Access privilege.

## Elements and Sections in the Client Side Extensions XML Output File

The following table describes the elements and sections in the client side extensions XML output file.

Description	Element or Section
The <code>&lt;ClientSideExtension&gt;</code> section contains all of the information for a single client side extension.	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>
<code>&lt;Name&gt;</code> is the name of the client side extension.	<pre>&lt;data:ClientSideExtension&gt;   &lt;data:Name&gt;Corporate&lt;/data:Name&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>
<p><code>&lt;UrIName&gt;</code> is a meaningful name for the URL that points to the client side extension.</p> <p>The following characters are accepted in the <code>UrIName</code> element: A-Z, a-z, 0-9, underscore (_), and period (.). Double periods (..) are not permitted, and a period (.) must not be the last character in the string. Examples of URL names are: <code>Logo_Image</code> and <code>Map376</code>. It is recommended that you keep this name as short as possible.</p>	<pre>&lt;data:ClientSideExtension&gt; . . .   &lt;data:UrIName&gt;Company_Logo&lt;/data:UrIName&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>

Description	Element or Section
<p><b>Note:</b> If you change the URL name on an existing client side extension, then the relative URL and full URL will be changed. If the client side extension has already been deployed, then you must update custom Web tabs, custom Web applets, global Web tabs, or custom HTML head additions that reference this client side extension to use the newly generated URL.</p>	
<p>&lt;RelativeURL&gt; is the relative URL that navigates to the client side extension from within Oracle CRM On Demand. The value in this element is generated by Oracle CRM On Demand, and the element is read-only.</p>	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;data:RelativeURL&gt;/user/content/Company_Logo&lt;/data:RelativeURL&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>
<p>&lt;FullURL&gt; is the full URL that points to the URL in the Oracle CRM On Demand application. The value in this element is generated by Oracle CRM On Demand, and the element is read-only.</p>	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;data:FullURL&gt;https://example.com/user/content/Company_Logo&lt;/data:FullURL&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>
<p>&lt;Description&gt; is the description of the client side extension.</p>	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;data:Description&gt;Company logo&lt;/data:Description&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>
<p>&lt;FileName&gt; is the name of the file, including the file extension.</p>	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;data:FileName&gt;logo.jpg&lt;/data:FileName&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>
<p>&lt;MIMETYPE&gt; is the Internet media (MIME) type of the file.</p> <p>The following are some examples of MIME types:</p> <ul style="list-style-type: none"> <li>• text/html</li> <li>• image/jpeg</li> <li>• image/gif</li> <li>• application/x-shockwave-flash</li> <li>• text/css</li> </ul>	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;data:MIMETYPE&gt;image/jpeg&lt;/data:MIMETYPE&gt; &lt;/data:ClientSideExtension&gt;</pre>
<p>&lt;Extension&gt; is the file extension of the file. The value in this element is generated by Oracle CRM On Demand, and the element is read-only.</p>	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;data:Extension&gt;.jpg&lt;/data:Extension&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>

Description	Element or Section
<p>&lt;FileSize&gt; is the size of the file in bytes. The value in this element is generated by Oracle CRM On Demand, and the element is read-only.</p>	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;data:FileSize&gt;106590&lt;/data:FileSize&gt; . . . &lt;/data:ClientSideExtension&gt;</pre>
<p>&lt;FileData&gt; contains the reference to the identifier (the Content-ID) for the attachment file.</p> <p>The Oracle Migration Tool On Demand client uses the Message Transmission Optimized Mechanism (MTOM) specification with the XML-binary Optimized Packaging (XOP) convention and the Multipurpose Internet Mail Extensions (MIME) standard to extract and return the client side extension configuration data and the file attached to the client side extension. Therefore, the content of the &lt;FileData&gt; element in the SOAP request is packaged as an MTOM/XOP request.</p>	<pre>&lt;data:ClientSideExtension&gt; . . . &lt;data:FileData&gt;&lt;xop:Include xmlns:xop='http://www.w3.org/2004/08/xop/ include href='cid:Logo2021'/&gt;&lt;/data:FileData&gt; &lt;/data:ClientSideExtension&gt;</pre>

## Migrating Client Side Extensions

The following topics describe how to use the Oracle Migration Tool On Demand client to migrate client side extensions:

- [Extracting a Single Client Side Extension](#)
- [Extracting All Client Side Extensions](#)
- [Updating or Inserting a Client Side Extension](#)

**Note:** Back up your configuration data and all other relevant data before running the Oracle Migration Tool On Demand client.

### Extracting a Single Client Side Extension

This topic describes how to extract a single client side extension from your Oracle CRM On Demand environment.

#### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract a client side extension:

```
migrationtool -u UserID -s ServerURL Read ClientSideExtension ClientSideExtensionName
```



where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ClientSideExtensionName* is the name of a client side extension.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

The output XML file is named with the name of the client side extension, and it is saved in the following directory:

```
...\repository\ClientSideExtension
```

A subdirectory with the same name as the client side extension is also created, and a metadata file and the attachment file are placed within the subdirectory.

## Example of Extracting a Single Client Side Extension

The following is an example of extracting a client side extension named Company Logo:

```
migrationtool -u UserID -s ServerURL Read ClientSideExtension "Company Logo"
```

**Note:** If the name of the client side extension contains spaces or special characters, then it must be enclosed with quotation marks.

## Extracting All Client Side Extensions

This topic describes how to extract all of the client side extensions from your Oracle CRM On Demand environment.

### Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to extract all of the client side extensions:

```
migrationtool -u UserID -s ServerURL ReadAll ClientSideExtension
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

The output XML files are named with the names of the client side extensions, and they are saved in the following directory:

```
... \repository\ClientSideExtension
```

A subdirectory with the same name as the client side extension is also created for each client side extension. A metadata file and the attachment file for the client side extension are placed within the subdirectory.

## Updating or Inserting a Client Side Extension

This topic describes how to update a client side extension (if it exists) or insert a client side extension (if it does not exist) on your Oracle CRM On Demand environment (customer test environment or production).

### About the Upsert Operation

The `upsert` command inserts or updates a client side extension based on the user key: Name.

Oracle CRM On Demand attempts to locate the client side extension specified in the input file based on the user key. If a match is located, then the client side extension is updated. If Oracle CRM On Demand cannot locate a client side extension based on the user key, then a new client side extension is created.

For an upsert operation, the attachment to be uploaded must be saved in a subdirectory of the directory where the client side extension XML file is saved, and the subdirectory must have the same name as the client side extension. The subdirectory must also contain a metadata text file that has the same name as the client side extension and is saved with the `.metadata` file extension. In the metadata file, the information for the file must be specified in the following format:

```
FileName: filename.fileextension  
Content-Id: content-id  
Content-Type: MIMETYPE
```

where:

- *filename* must match the value in the `<FileName>` element in the XML file that contains the configuration data for the client side extension.
- *fileextension* must match the value in the `<Extension>` element in the XML file that contains the configuration data for the client side extension.
- *content-id* must match the content-id value in the `<FileData>` element in the XML file that contains the configuration data for the client side extension.
- *MIMETYPE* must match the value in the `<MIMETYPE>` element in the XML file that contains the configuration data for the client side extension.

For example:

```
FileName: logo.jpg  
Content-Id: Logo2021  
Content-Type: image/jpeg
```

**Note:** When you extract client side extensions, the metadata file is generated automatically and is saved together with the attachment file in the subdirectory for the client side extension.

## Syntax

The following is the syntax for using the Oracle Migration Tool On Demand client to insert or update a client side extension:

```
migrationtool -u UserID -s ServerURL Upsert ClientSideExtension ClientSideExtensionXML
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *ServerURL* is the URL for the Oracle CRM On Demand server where your company resides.
- *ClientSideExtensionXML* is the fully qualified path name of the client side extension XML file, for example:

```
C:\My Files\logo.xml
```

If the fully qualified path name contains any spaces, then it must be enclosed with quotation marks, for example:

```
migrationtool -u UserID -s ServerURL Upsert ClientSideExtension "C:\My Files\logo2021.xml"
```

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## Example of Updating or Inserting a Client Side Extension

The following is an example of updating a client side extension (if it exists) or inserting the client side extension (if it does not exist) in your Oracle CRM On Demand server:

```
migrationtool -u UserID -s ServerURL Upsert ClientSideExtension "C:\Oracle Migration Tool On Demand\windows\nrepository\Client Side Extension\logo2021.xml"
```

**Note:** Quotation marks are required only if the fully qualified path name contains spaces.



# 36 Replicating Configuration Data from a Source Environment to a Target Environment

## Replicating Configuration Data from a Source Environment to a Target Environment

This chapter describes how to migrate all or selective configuration data from a source environment to a target environment of Oracle CRM On Demand using the command-line interface of the Oracle Migration Tool On Demand client. It contains the following topics:

- [Replicating All Configuration Data from a Source Environment to a Target Environment](#)
- [Replicating Selective Configuration Data from a Source Environment to a Target Environment](#)

## Replicating All Configuration Data from a Source Environment to a Target Environment

This topic describes the commands that you run to replicate all the configuration data from a source environment to a target environment of Oracle CRM On Demand using the command-line interface of the Oracle Migration Tool On Demand client.

**CAUTION:** Most components of Oracle CRM On Demand cannot revert to their original states by using the backup copies of the configuration data. For example, after a new access profile is inserted into the target environment, it cannot be removed by using the backup copy (that is, access profiles in Oracle CRM On Demand cannot be deleted). A backup copy of the configuration data provides a reference of the target environment before applying new configuration data.

**Note:** In the following examples, the Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

### To replicate all configuration data from a source environment to a target environment

1. Start the command-line interface of the Oracle Migration Tool On Demand client, as described in [Starting the Oracle Migration Tool On Demand Client Command-Line Interface](#).
2. Back up the existing configuration data in the target environment by running the following commands:

```
migrationtool -u UserID -s TargetServer ReadAll AccessProfile  
migrationtool -u UserID -s TargetServer ReadAll ActionBarCustomWebApplet  
migrationtool -u UserID -s TargetServer ReadAll ActionBarLayout
```

```
migrationtool -u UserID -s TargetServer ReadAll AssignmentRule
migrationtool -u UserID -s TargetServer ReadAll AssignmentRuleGroup
migrationtool -u UserID -s TargetServer ReadAll CascadingPicklist
migrationtool -u UserID -s TargetServer ReadAll ClientSideExtension
migrationtool -u UserID -s TargetServer ReadAll ConcatenatedField
migrationtool -u UserID -s TargetServer ReadForValue CustomHTMLHeadTag
migrationtool -u UserID -s TargetServer ReadAll CustomRecordType
migrationtool -u UserID -s TargetServer ReadAll CustomWebLink
migrationtool -u UserID -s TargetServer ReadAll CustomWebTab
migrationtool -u UserID -s TargetServer ReadAll DetailPageCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll DynamicLayout
migrationtool -u UserID -s TargetServer ReadAll EnableModificationTracking
migrationtool -u UserID -s TargetServer ReadAll FieldAuditSetUp
migrationtool -u UserID -s TargetServer ReadAll FieldManagement
migrationtool -u UserID -s TargetServer ReadAll HomePageCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll HomepageLayout
migrationtool -u UserID -s TargetServer ReadAll HomeTabCustomWebApplet
migrationtool -u UserID -s TargetServer ReadAll IntegrationEventQueue
migrationtool -u UserID -s TargetServer ReadAll LeadConversionMapping
migrationtool -u UserID -s TargetServer ReadAll ListAccessAndOrder
migrationtool -u UserID -s TargetServer ReadAll PageLayoutField
migrationtool -u UserID -s TargetServer ReadAll PageLayoutRelatedInformation
migrationtool -u UserID -s TargetServer ReadAll PageLayoutSection
migrationtool -u UserID -s TargetServer ReadAll Picklist
migrationtool -u UserID -s TargetServer ReadAll PicklistValueGroup
migrationtool -u UserID -s TargetServer ReadAll ProcessAdministration
migrationtool -u UserID -s TargetServer ReadAll ProcessAdministrationTransitionState
migrationtool -u UserID -s TargetServer ReadAll RelatedInformationLayout
migrationtool -u UserID -s TargetServer ReadAll ReportFolder
migrationtool -u UserID -s TargetServer ReadAll Role
migrationtool -u UserID -s TargetServer ReadAll SalesAssessmentTemplate
migrationtool -u UserID -s TargetServer ReadAll SalesCategory
migrationtool -u UserID -s TargetServer ReadAll SalesProcess
migrationtool -u UserID -s TargetServer ReadAll SalesStage
migrationtool -u UserID -s TargetServer ReadAll SearchLayout
migrationtool -u UserID -s TargetServer ReadAll WorkflowRuleSet
```

where:

- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand target environment where the extraction occurs.
- *TargetServer* is the URL for the Oracle CRM On Demand target server for the target environment.

In addition, back up all workflow action sets for each of the record types and trigger events that exist on the target server:

```
migrationtool -u UserID -s TargetServer ReadForRuleSet WorkflowActionSet RecordType
TriggerEvent [ParentRecordType]
```

For more details on extracting workflow action sets, see [Extracting a Workflow Action or a Workflow Action Set](#).

In addition, back up all workflow user sets that exist on the target server:

```
migrationtool -u UserID -s TargetServer ReadForRuleSet WorkflowUserSet Analytics ScheduledEvent
```

For more details on extracting workflow user sets, see [Extracting Workflow User Sets](#).

### 3. Retrieve all configuration data from the source environment by running the following commands:

```
migrationtool -u UserID -s SourceServer ReadAll AccessProfile
migrationtool -u UserID -s SourceServer ReadAll ActionBarCustomWebApplet
```

```
migrationtool -u UserID -s SourceServer ReadAll ActionBarLayout
migrationtool -u UserID -s SourceServer ReadAll AssignmentRule
migrationtool -u UserID -s SourceServer ReadAll AssignmentRuleGroup
migrationtool -u UserID -s SourceServer ReadAll CascadingPicklist
migrationtool -u UserID -s SourceServer ReadAll ClientSideExtension
migrationtool -u UserID -s SourceServer ReadAll ConcatenatedField
migrationtool -u UserID -s SourceServer ReadForValue CustomHTMLHeadTag
migrationtool -u UserID -s SourceServer ReadAll CustomRecordType
migrationtool -u UserID -s SourceServer ReadAll CustomWebLink
migrationtool -u UserID -s SourceServer ReadAll CustomWebTab
migrationtool -u UserID -s SourceServer ReadAll DetailPageCustomWebApplet
migrationtool -u UserID -s SourceServer ReadAll DynamicLayout
migrationtool -u UserID -s SourceServer ReadAll EnableModificationTracking
migrationtool -u UserID -s SourceServer ReadAll FieldAuditSetUp
migrationtool -u UserID -s SourceServer ReadAll FieldManagement
migrationtool -u UserID -s SourceServer ReadAll HomePageCustomWebApplet
migrationtool -u UserID -s SourceServer ReadAll HomepageLayout
migrationtool -u UserID -s SourceServer ReadAll HomeTabCustomWebApplet
migrationtool -u UserID -s SourceServer ReadAll IntegrationEventQueue
migrationtool -u UserID -s SourceServer ReadAll LeadConversionMapping
migrationtool -u UserID -s SourceServer ReadAll ListAccessAndOrder
migrationtool -u UserID -s SourceServer ReadAll PageLayoutField
migrationtool -u UserID -s SourceServer ReadAll PageLayoutRelatedInformation
migrationtool -u UserID -s SourceServer ReadAll PageLayoutSection
migrationtool -u UserID -s SourceServer ReadAll Picklist
migrationtool -u UserID -s SourceServer ReadAll PicklistValueGroup
migrationtool -u UserID -s SourceServer ReadAll ProcessAdministration
migrationtool -u UserID -s SourceServer ReadAll ProcessAdministrationTransitionState
migrationtool -u UserID -s SourceServer ReadAll RelatedInformationLayout
migrationtool -u UserID -s SourceServer ReadAll ReportFolder
migrationtool -u UserID -s SourceServer ReadAll Role
migrationtool -u UserID -s SourceServer ReadAll SalesAssessmentTemplate
migrationtool -u UserID -s SourceServer ReadAll SalesCategory
migrationtool -u UserID -s SourceServer ReadAll SalesProcess
migrationtool -u UserID -s SourceServer ReadAll SalesStage
migrationtool -u UserID -s SourceServer ReadAll SearchLayout
migrationtool -u UserID -s SourceServer ReadAll WorkflowRuleSet
```

where:

- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand source environment where the extraction occurs.
- *SourceServer* is the URL for the Oracle CRM On Demand source server for the source environment.

In addition, extract all workflow action sets for each of the record types and trigger events that exist on the source server:

```
migrationtool -u UserID -s SourceServer ReadForRuleSet WorkflowActionSet RecordType
TriggerEvent [ParentRecordType]
```

For more details on extracting workflow action sets, see [Extracting a Workflow Action or a Workflow Action Set](#).

In addition, extract all workflow user sets that exist on the source server:

```
migrationtool -u UserID -s SourceServer ReadForRuleSet WorkflowUserSet Analytics ScheduledEvent
```

For more details on extracting workflow user sets, see [Extracting Workflow User Sets](#).

4. Perform an Upsert operation (or an InsertOrUpdate operation, in the case of workflow rules, workflow actions, and workflow users) for each XML file to the target environment by running the following commands:

```

migrationtool -u UserID -s TargetServer Upsert CustomRecordType CustomizedRecordTypeXML
migrationtool -u UserID -s TargetServer Upsert CustomWebTab CustomWebTabXML
migrationtool -u UserID -s TargetServer Upsert FieldManagement FieldManagementXML
migrationtool -u UserID -s TargetServer Upsert Picklist PicklistXML
migrationtool -u UserID -s TargetServer Upsert CascadingPicklist CascadingPicklistXML
migrationtool -u UserID -s TargetServer Upsert PicklistValueGroup PicklistValueGroupXML
migrationtool -u UserID -s TargetServer Upsert CustomWebLink CustomWebLinkXML
migrationtool -u UserID -s TargetServer Upsert ConcatenatedField ConcatenatedFieldXML
migrationtool -u UserID -s TargetServer Upsert ActionBarCustomWebApplet ActionBarCustomWebAppletXML
migrationtool -u UserID -s TargetServer Upsert DetailPageCustomWebApplet DetailPageCustomWebAppletXML
migrationtool -u UserID -s TargetServer Upsert HomepageCustomWebApplet HomepageCustomWebAppletXML
migrationtool -u UserID -s TargetServer Upsert HomeTabCustomWebApplet HomeTabCustomWebAppletXML
migrationtool -u UserID -s TargetServer Upsert SalesAssessmentTemplate SalesAssessmentScriptXML
migrationtool -u UserID -s TargetServer Upsert HomepageLayout HomepageLayoutXML
migrationtool -u UserID -s TargetServer Upsert ActionBarLayout ActionBarLayoutXML
migrationtool -u UserID -s TargetServer Upsert RelatedInformationLayout RelatedInfoLayoutXML
migrationtool -u UserID -s TargetServer Upsert AccessProfile AccessProfileXML
migrationtool -u UserID -s TargetServer Upsert PageLayoutField PageLayoutFieldXML
migrationtool -u UserID -s TargetServer Upsert PageLayoutRelatedInformation PageLayoutRelatedXML
migrationtool -u UserID -s TargetServer Upsert PageLayoutSection PageLayoutSectionXML
migrationtool -u UserID -s TargetServer Upsert DynamicLayout DynamicLayoutXML
migrationtool -u UserID -s TargetServer Upsert SearchLayout SearchLayoutXML
migrationtool -u UserID -s TargetServer Upsert Role RoleXML
migrationtool -u UserID -s TargetServer Upsert IntegrationEventQueue IntegrationEventQueueXML
migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowRules WorkflowRulesXML
migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowActionSet WorkflowActionSetXML
migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowUserSet WorkflowUsersXML
migrationtool -u UserID -s TargetServer Upsert AssignmentRuleGroup AssignmentRuleGroupXML
migrationtool -u UserID -s TargetServer Upsert AssignmentRule AssignmentRuleXML
migrationtool -u UserID -s TargetServer Upsert ListAccessAndOrder ListAccessAndOrderXML
migrationtool -u UserID -s TargetServer Upsert ReportFolder ReportFolderXML
migrationtool -u UserID -s TargetServer Upsert CustomHTMLHeadTag CustomHTMLHeadTagXML
migrationtool -u UserID -s TargetServer Upsert FieldAuditSetUp FieldAuditSetUpXML
migrationtool -u UserID -s TargetServer Upsert SalesCategory SalesCategoryXML
migrationtool -u UserID -s TargetServer Upsert EnableModificationTracking EnableModificationTrackingXML
migrationtool -u UserID -s TargetServer Upsert ProcessAdministration ProcessXML
migrationtool -u UserID -s TargetServer Upsert ProcessAdministrationTransitionState TransitionStateXML
migrationtool -u UserID -s TargetServer Upsert LeadConversionMapping LeadConversionMappingXML
migrationtool -u UserID -s TargetServer Upsert SalesProcess SalesProcessXML
migrationtool -u UserID -s TargetServer Upsert SalesStage SalesStageXML
migrationtool -u UserID -s TargetServer Upsert ClientSideExtension ClientSideExtensionXML

```

where:

- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand environment where the Upsert operation occurs.
- *TargetServer* is the URL for the Oracle CRM On Demand target server for the target environment.
- *AccessProfileXML* is the fully qualified path name of the access profile XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\AccessProfile\MyCustomProfile.xml
- *ActionBarCustomWebAppletXML* is the fully qualified path name of the Action bar customized Web applet XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\ActionBarCustomWebApplet\MyActionBarCustomWebApplet.xml
- *ActionBarLayoutXML* is the fully qualified path name of the Action Bar layout XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\ActionBarLayout\MyActionBarLayout.xml
- *AssignmentRuleGroupXML* is the fully qualified path name of the assignment rule group XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\AssignmentRuleGroup\Account\MyAssignmentRuleGroup.xml



- *AssignmentRuleXML* is the fully qualified path name of the assignment rule XML file, for example, c:  
\`Oracle Migration Tool On Demand\windows\repository\AssignmentRule\Account\My AssignmentRuleGroup\My AssignmentRule1.xml`
- *CascadingPicklistXML* is the fully qualified path name of the cascading picklist XML file, for example, c:  
\`Oracle Migration Tool On Demand\windows\repository\CascadingPicklist\Account.xml`
- *ClientSideExtensionXML* is the fully qualified path name of the concatenated field XML file, for example,  
c:\`Oracle Migration Tool On Demand\windows\repository\ClientSideExtension\logo.xml`
- *ConcatenatedFieldXML* is the fully qualified path name of the concatenated field XML file, for example, c:  
\`Oracle Migration Tool On Demand\windows\repository\ConcatenatedField\Account.xml`
- *CustomHTMLHeadTagXML* is the fully qualified path name of the custom HTML head tag additions XML file, for example, c:\`Oracle Migration Tool On Demand\windows\repository\CustomHTMLHeadTag\CustomHTMLHeadTag.xml`
- *CustomizedRecordTypeXML* is the fully qualified path name of the customized record type XML file, for example, c:\`Oracle Migration Tool On Demand\windows\repository\CustomRecordType\My CustomRecordType.xml`
- *CustomWebLinkXML* is the fully qualified path name of the custom Web link XML file, for example, c:  
\`Oracle Migration Tool On Demand\windows\repository\CustomWebLink\Account.xml`
- *CustomWebTabXML* is the fully qualified path name of the custom Web tab XML file, for example, c:  
\`Oracle Migration Tool On Demand\windows\repository\CustomWebTab\My CustomWebTab.xml`
- *DetailPageCustomWebAppletXML* is the fully qualified path name of the detail page customized Web applet XML file, for example, c:\`Oracle Migration Tool On Demand\windows\repository\DetailPageCustomWebApplet\Account\MyDetailPageCustomWebApplet.xml`
- *DynamicLayoutXML* is the fully qualified path name of the dynamic layout XML file, for example, c:  
\`Oracle Migration Tool On Demand\windows\repository\DynamicLayout\Account.xml`
- *EnableModificationTrackingXML* is the fully qualified path name of the modification tracking settings XML file, for example c:\`Oracle Migration Tool On Demand\windows\repository\EnableModificationTracking\Account.xml`
- *FieldAuditSetUpXML* is the fully qualified path name of the field audit setup XML file, for example c:  
\`Oracle Migration Tool On Demand\windows\repository\FieldAuditSetUp\Account.xml`
- *FieldManagementXML* is the fully qualified path name of the field management XML file, for example, c:  
\`Oracle Migration Tool On Demand\windows\repository\FieldManagement\Account.xml`
- *HomepageCustomWebAppletXML* is the fully qualified path name of the homepage customized Web applet XML file, for example, c:\`Oracle Migration Tool On Demand\windows\repository\HomePageCustomWebApplet\Account\MyHomePageCustomWebApplet.xml`
- *HomepageLayoutXML* is the fully qualified path name of the homepage layout XML file, for example, c:  
\`Oracle Migration Tool On Demand\windows\repository\HomepageLayout\Account\My HomepageLayout.xml`
- *HomeTabCustomWebAppletXML* is the fully qualified path name of the Home tab customized Web applet XML file, for example, c:\`Oracle Migration Tool On Demand\windows\repository\HomeTabCustomWebApplet\MyHomeTabCustomWebApplet.xml`
- *IntegrationEventQueueXML* is the fully qualified path name of the integration event queue XML file, for example, c:\`Oracle Migration Tool On Demand\windows\repository\IntegrationEventQueue\MyIntegrationEventQueue.xml`
- *LeadConversionMappingXML* is the fully qualified path name of the lead conversion mapping XML file, for example, c:\`Oracle Migration Tool On Demand\windows\repository\LeadConversionMapping\Date of Birth.xml`
- *ListAccessAndOrderXML* is the fully qualified path name of the list access and order layout XML file, for example c:\`Oracle Migration Tool On Demand\windows\repository>ListAccessAndOrder\Account\ExpertRole.xml`

- *PageLayoutFieldXML* is the fully qualified path name of a page layout field information XML file for a specific record type such as Account, for example, c:\Oracle Migration Tool On Demand\windows\repository\PageLayoutField\Account\AccountCustom.xml
- *PageLayoutRelatedXML* is the fully qualified path name of a page layout related information XML file for a specific record type such as Account, for example, c:\Oracle Migration Tool On Demand\windows\repository\PageLayoutRelatedInformation\Account\AccountCustom.xml
- *PageLayoutSectionXML* is the fully qualified path name of a page layout section XML file for a specific record type such as Account, for example, c:\Oracle Migration Tool On Demand\windows\repository\PageLayoutSection\Account\AccountCustom.xml
- *PicklistXML* is the fully qualified path name of the picklist XML file for a specific record type such as Account, for example, c:\Oracle Migration Tool On Demand\windows\repository\Picklist\Account.xml
- *PicklistValueGroupXML* is the fully qualified path name of the picklist value group XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\PickValueGroup\MyPicklistValueGroup.xml
- *ProcessXML* is the fully qualified path name of the process administration XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\ProcessAdministration\Account.xml
- *RelatedInfoLayoutXML* is the fully qualified path name of the related information layout XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\RelatedInformationLayout>Contact\ContactAccountChildList\MyRelatedInfoLayout.xml
- *ReportFolderXML* is the fully qualified path name of the XML file containing the role associations for an analytics folder, for example, c:\Oracle Migration Tool On Demand\windows\repository\ReportFolder\MyFolder.xml
- *RoleXML* is the fully qualified path name of the role XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\Role\MyRole.xml
- *SalesAssessmentScriptXML* is the fully qualified path name of the sales assessment template XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\SalesAssessmentTemplate\AccountSurvey\MyAssessmentScript.xml
- *SalesCategoryXML* is the fully qualified path name of the sales category XML file, for example c:\Oracle Migration Tool On Demand\windows\repository\SalesCategory\1.xml
- *SalesProcessXML* is the fully qualified path name of the sales process XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\SalesProcess\High Potential.xml
- *SalesStageXML* is the fully qualified path name of the sales stage XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\SalesStage\[High Potential]\Short List.xml
- *SearchLayoutXML* is the fully qualified path name of the search layout XML file, for example c:\Oracle Migration Tool On Demand\windows\repository\SearchLayout\Account\MyAccountSearchLayout.xml
- *TransitionStateXML* is the fully qualified path name of the process administration XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\ProcessAdministrationTransitionsState\Activity\Assigned.xml
- *WorkflowRulesXML* is the fully qualified path name of the workflow rules XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\WorkflowRuleSet\Activity\WriteRecordNew.xml
- *WorkflowActionSetXML* is the fully qualified path name of the workflow action set XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\WorkflowActionSet\Task\_email.xml
- *WorkflowUsersXML* is the fully qualified path name of the workflow user set XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\WorkflowUserSet\ScheduledEvent1.xml

**Note:** The `Upsert` command must be run for each XML file that is retrieved from the source environment. For example, if ten access profile XML files are retrieved from the source environment, then ten Upsert operations (one for each XML file) are required.

# Replicating Selective Configuration Data from a Source Environment to a Target Environment

This topic describes the commands that you run to replicate a subset of the configuration data from a source environment to a target environment of Oracle CRM On Demand using the command-line interface of the Oracle Migration Tool On Demand client.

**CAUTION:** Most components of Oracle CRM On Demand cannot revert to their original states by using the backup copies of the configuration data. For example, after a new access profile is inserted into the target environment, it cannot be removed by using the backup copy (that is, access profiles in Oracle CRM On Demand cannot be deleted). A backup copy of the configuration data provides a reference of the target environment before applying new configuration data.

**Note:** The Oracle Migration Tool On Demand client requests your Oracle CRM On Demand password, which can be redirected (using the pipe command) to the client program from standard input; that is, from a file, from the command line, or from another program.

## To replicate selective configuration data from a source environment to a target environment

1. Start the command-line interface of the Oracle Migration Tool On Demand client, as described in [Starting the Oracle Migration Tool On Demand Client Command-Line Interface](#).
2. Back up the configuration data that you want to change or update on the target environment by running the following command:

```
migrationtool -u UserID -s TargetServer ReadAll Feature
```

where:

- *UserID* is the user sign-in ID that has the appropriate privileges to run the Oracle Migration Tool On Demand client commands.
- *TargetServer* is the URL for the Oracle CRM On Demand target server for the target environment.
- *Feature* is the type of configuration data to be extracted from the target environment. It can be one of the following values:
  - **AccessProfile.** For Oracle CRM On Demand access profile configuration data.
  - **ActionBarCustomWebApplet.** For Oracle CRM On Demand Action bar Web applet configuration data.
  - **ActionBarLayout.** For Oracle CRM On Demand Action bar layout configuration data.
  - **AssignmentRuleGroup.** For Oracle CRM On Demand assignment rule groups.
  - **AssignmentRules.** For Oracle CRM On Demand assignment rules.
  - **CascadingPicklist.** For Oracle CRM On Demand cascading picklist configuration data.
  - **ClientSideExtension.** For Oracle CRM On Demand client side extension configuration data.

- **ConcatenatedField.** For Oracle CRM On Demand concatenated field configuration data.
- **CustomRecordType.** For Oracle CRM On Demand record type configuration data.
- **CustomWebLink.** For Oracle CRM On Demand customized Web link field configuration data.
- **CustomWebTab.** For Oracle CRM On Demand Web tab configuration data.
- **DetailPageCustomWebApplet.** For Oracle CRM On Demand detail page Web applet configuration data.
- **DynamicLayout.** For Oracle CRM On Demand dynamic layout configuration data.
- **EnableModificationTracking.** For Oracle CRM On Demand modification tracking settings.
- **FieldAuditSetup.** For Oracle CRM On Demand field audit setup configuration data.
- **FieldManagement.** For Oracle CRM On Demand field configuration data.
- **HomePageCustomWebApplet.** For Oracle CRM On Demand homepage Web applet configuration data.
- **HomepageLayout.** For Oracle CRM On Demand homepage layout configuration data.
- **HomeTabCustomWebApplet.** For Oracle CRM On Demand Home tab Web applet configuration data.
- **IntegrationEventQueue.** For Oracle CRM On Demand integration event queue configuration data.
- **LeadConversionMapping.** For Oracle CRM On Demand lead conversion mapping configuration data.
- **ListAccessAndOrder.** For Oracle CRM On Demand list access and order layouts.
- **PageLayoutField.** For Oracle CRM On Demand page layout field configuration data.
- **PageLayoutRelatedInformation.** For Oracle CRM On Demand page layout related information configuration data.
- **PageLayoutSection.** For Oracle CRM On Demand page layout section configuration data.
- **Picklist.** For Oracle CRM On Demand customized picklist configuration data.
- **PicklistValueGroup.** For Oracle CRM On Demand picklist value group configuration data.
- **ProcessAdministration.** For Oracle CRM On Demand process administration configuration data.
- **ProcessAdministrationTransitionState.** For Oracle CRM On Demand process administration transition state configuration data.
- **RelatedInformationLayout.** For Oracle CRM On Demand related information configuration data.
- **ReportFolder.** For Oracle CRM On Demand role associations for analytics folders.
- **Role.** For Oracle CRM On Demand role configuration data.
- **SalesAssessmentTemplate.** For Oracle CRM On Demand sales assessment template configuration data.
- **SalesCategory.** For Oracle CRM On Demand field sales category configuration data.
- **SalesProcess.** For Oracle CRM On Demand sales process configuration data.
- **SalesStage.** For Oracle CRM On Demand sales stage configuration data.
- **SearchLayout.** For Oracle CRM On Demand search layout configuration data.
- **WorkflowActionSet.** For Oracle CRM On Demand workflow actions configuration data.
- **WorkflowRuleSet.** For Oracle CRM On Demand workflow rules configuration data.
- **WorkflowUserSet.** For Oracle CRM On Demand workflow users configuration data.

**Note:** You can use any third-party application of your choice to store a history of changes, for example, IBM® Rational® ClearCase®.

3. If you want to back up the custom HTML head tag additions from the target server, run the following command:

```
migrationtool -u UserID -s TargetServer ReadForValue CustomHTMLHeadTag
```

4. Retrieve the required configuration data from the source environment by running one of the following commands:

- o `migrationtool -u UserID -s SourceServer ReadAll Feature`
- o `migrationtool -u UserID -s SourceServer Read Feature MetadataFilename`

where:

- o *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand source environment where the extraction occurs.
- o *SourceServer* is the URL for the Oracle CRM On Demand source server for the source environment.
- o *Feature* is the type of configuration data to be extracted from the target environment. It can be one of the following values:
  - **AccessProfile.** For Oracle CRM On Demand access profile configuration data.
  - **ActionBarCustomWebApplet.** For Oracle CRM On Demand Action bar Web applet configuration data.
  - **ActionBarLayout.** For Oracle CRM On Demand Action bar layout configuration data.
  - **AssignmentRuleGroup.** For Oracle CRM On Demand assignment rule groups.
  - **AssignmentRules.** For Oracle CRM On Demand assignment rules.
  - **CascadingPicklist.** For Oracle CRM On Demand cascading picklist configuration data.
  - **ClientSideExtension.** For Oracle CRM On Demand client side extension configuration data.
  - **ConcatenatedField.** For Oracle CRM On Demand concatenated field configuration data.
  - **CustomRecordType.** For Oracle CRM On Demand record type configuration data.
  - **CustomWebLink.** For Oracle CRM On Demand customized Web link field configuration data.
  - **CustomWebTab.** For Oracle CRM On Demand Web tab configuration data.
  - **DetailPageCustomWebApplet.** For Oracle CRM On Demand detail page Web applet configuration data.
  - **DynamicLayout.** For Oracle CRM On Demand dynamic layout configuration data.
  - **EnableModificationTracking.** For Oracle CRM On Demand modification tracking settings.
  - **FieldAuditSetup.** For Oracle CRM On Demand field audit setup configuration data.
  - **FieldManagement.** For Oracle CRM On Demand field configuration data.
  - **HomePageCustomWebApplet.** For Oracle CRM On Demand homepage Web applet configuration data.
  - **HomepageLayout.** For Oracle CRM On Demand homepage layout configuration data.
  - **HomeTabCustomWebApplet.** For Oracle CRM On Demand Home tab Web applet configuration data.
  - **IntegrationEventQueue.** For Oracle CRM On Demand integration event queue configuration data.
  - **LeadConversionMapping.** For Oracle CRM On Demand lead conversion mapping configuration data.
  - **ListAccessAndOrder.** For Oracle CRM On Demand list access and order layouts.
  - **PageLayoutField.** For Oracle CRM On Demand page layout field configuration data.
  - **PageLayoutRelatedInformation.** For Oracle CRM On Demand page layout related information configuration data.
  - **PageLayoutSection.** For Oracle CRM On Demand page layout section configuration data.
  - **Picklist.** For Oracle CRM On Demand customized picklist configuration data.



- **PicklistValueGroup.** For Oracle CRM On Demand picklist value group configuration data.
  - **ProcessAdministration.** For Oracle CRM On Demand process administration configuration data.
  - **ProcessAdministrationTransitionState.** For Oracle CRM On Demand process administration transition state configuration data.
  - **RelatedInformationLayout.** For Oracle CRM On Demand related information configuration data.
  - **ReportFolder.** For Oracle CRM On Demand role associations for analytics folders.
  - **Role.** For Oracle CRM On Demand role configuration data.
  - **SalesAssessmentTemplate.** For Oracle CRM On Demand sales assessment template configuration data.
  - **SalesCategory.** For Oracle CRM On Demand field sales category configuration data.
  - **SalesProcess.** For Oracle CRM On Demand sales process configuration data.
  - **SalesStage.** For Oracle CRM On Demand sales stage configuration data.
  - **SearchLayout.** For Oracle CRM On Demand search layout configuration data.
  - **WorkflowActionSet.** For Oracle CRM On Demand workflow actions configuration data.
  - **WorkflowRuleSet.** For Oracle CRM On Demand workflow rules configuration data.
  - **WorkflowUserSet.** For Oracle CRM On Demand workflow users configuration data.
- o *MetadataFilename* is the name of the configuration data XML file to be retrieved, for example, for an access profile, use:

```
C:\Oracle Migration Tool On Demand\resources\template\AccessProfile.xml
```

**Note:** Running the `ReadAll` command is a simpler way to obtain the configuration data that you require if you are planning to replicate a subset of configuration data from the source environment. For example, if you are replicating ten access profiles out of twenty, then you can run one `ReadAll` command. However, performing a `Read` command is a way of retrieving the exact configuration data that you require.

5. If you want to extract the custom HTML head tag additions from the source server, run the following command:

```
migrationtool -u UserID -s SourceServer ReadForValue CustomHTMLHeadTag
```

6. Perform an Upsert operation (or an InsertOrUpdate operation, in the case of workflow rules, workflow actions, and workflow users) for the required XML file to the target environment by running the following commands, as applicable:

```
migrationtool -u UserID -s TargetServer Upsert CustomRecordType CustomizedRecordTypeXML
migrationtool -u UserID -s TargetServer Upsert CustomWebTab CustomWebTabXML
migrationtool -u UserID -s TargetServer Upsert FieldManagement FieldManagementXML
migrationtool -u UserID -s TargetServer Upsert Picklist PicklistXML
migrationtool -u UserID -s TargetServer Upsert CascadingPicklist CascadingPicklistXML
migrationtool -u UserID -s TargetServer Upsert PicklistValueGroup PicklistValueGroupXML
migrationtool -u UserID -s TargetServer Upsert CustomWebLink CustomWebLinkXML
migrationtool -u UserID -s TargetServer Upsert ConcatenatedField ConcatenatedFieldXML
migrationtool -u UserID -s TargetServer Upsert ActionBarCustomWebApplet ActionBarCustomWebAppletXML
migrationtool -u UserID -s TargetServer Upsert DetailPageCustomWebApplet DetailPageCustomWebAppletXML
migrationtool -u UserID -s TargetServer Upsert HomepageCustomWebApplet HomepageCustomWebAppletXML
migrationtool -u UserID -s TargetServer Upsert HomeTabCustomWebApplet HomeTabCustomWebAppletXML
migrationtool -u UserID -s TargetServer Upsert SalesAssessmentTemplate SalesAssessmentScriptXML
migrationtool -u UserID -s TargetServer Upsert HomepageLayout HomepageLayoutXML
migrationtool -u UserID -s TargetServer Upsert ActionBarLayout ActionBarLayoutXML
migrationtool -u UserID -s TargetServer Upsert RelatedInformationLayout RelatedInfoLayoutXML
migrationtool -u UserID -s TargetServer Upsert AccessProfile AccessProfileXML
migrationtool -u UserID -s TargetServer Upsert PageLayoutField PageLayoutFieldXML
migrationtool -u UserID -s TargetServer Upsert PageLayoutRelatedInformation PageLayoutRelatedXML
migrationtool -u UserID -s TargetServer Upsert PageLayoutSection PageLayoutSectionXML
migrationtool -u UserID -s TargetServer Upsert DynamicLayout DynamicLayoutXML
```

```
migrationtool -u UserID -s TargetServer Upsert SearchLayout SearchLayoutXML
migrationtool -u UserID -s TargetServer Upsert Role RoleXML
migrationtool -u UserID -s TargetServer Upsert IntegrationEventQueue IntegrationEventQueueXML
migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowRules WorkflowRulesXML
migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowActionSet WorkflowActionSetXML
migrationtool -u UserID -s TargetServer InsertOrUpdate WorkflowUserSet WorkflowUserSetXML
migrationtool -u UserID -s TargetServer Upsert AssignmentRuleGroup AssignmentRuleGroupXML
migrationtool -u UserID -s TargetServer Upsert AssignmentRule AssignmentRuleXML
migrationtool -u UserID -s TargetServer Upsert ListAccessAndOrder ListAccessAndOrderXML
migrationtool -u UserID -s TargetServer Upsert ReportFolder ReportFolderXML
migrationtool -u UserID -s TargetServer Upsert CustomHTMLHeadTag CustomHTMLHeadTagXML
migrationtool -u UserID -s TargetServer Upsert FieldAuditSetUp FieldAuditSetUpXML
migrationtool -u UserID -s TargetServer Upsert SalesCategory SalesCategoryXML
migrationtool -u UserID -s TargetServer Upsert EnableModificationTracking EnableModificationTrackingXML
migrationtool -u UserID -s TargetServer Upsert ProcessAdministration ProcessXML
migrationtool -u UserID -s TargetServer Upsert ProcessAdministrationTransitionState TransitionStateXML
migrationtool -u UserID -s TargetServer Upsert LeadConversionMapping LeadConversionMappingXML
migrationtool -u UserID -s TargetServer Upsert SalesProcess SalesProcessXML
migrationtool -u UserID -s TargetServer Upsert SalesStage SalesStageXML
migrationtool -u UserID -s TargetServer Upsert ClientSideExtension ClientSideExtensionXML
```

where:

- *UserID* is the customer administration user's sign-in ID for the Oracle CRM On Demand environment where the Upsert operation occurs.
- *TargetServer* is the URL for the Oracle CRM On Demand target server for the target environment.
- *AccessProfileXML* is the fully qualified path name of the access profile XML file, for example, `c:\Oracle Migration Tool On Demand\windows\repository\AccessProfile\MyCustomProfile.xml`
- *ActionBarCustomWebAppletXML* is the fully qualified path name of the Action bar customized Web applet XML file, for example, `c:\My Files\MyActionBarCustomWebApplet.xml`
- *ActionBarLayoutXML* is the fully qualified path name of the Action Bar layout XML file, for example, `c:\My Files\MyActionBarLayout.xml`
- *AssignmentRuleGroupXML* is the fully qualified path name of the assignment rule group XML file, for example, `c:\Oracle Migration Tool On Demand\windows\repository\AssignmentRuleGroup\Account\My AssignmentRuleGroup.xml`
- *AssignmentRuleXML* is the fully qualified path name of the assignment rule XML file, for example, `c:\Oracle Migration Tool On Demand\windows\repository\AssignmentRule\Account\My AssignmentRuleGroup\My AssignmentRule1.xml`
- *CascadingPicklistXML* is the fully qualified path name of the cascading picklist XML file, for example, `c:\My Files\MyCascadingPicklist.xml`
- *ClientSideExtensionXML* is the fully qualified path name of the client side extension XML file, for example, `c:\My Files\logo.xml`
- *ConcatenatedFieldXML* is the fully qualified path name of the concatenated field XML file, for example, `c:\My Files\MyConcatenatedField.xml`
- *CustomHTMLHeadTagXML* is the fully qualified path name of the custom HTML head tag additions XML file, for example, `c:\My Files\CustomHTMLHeadTag.xml`
- *CustomizedRecordTypeXML* is the fully qualified path name of the customized record type XML file, for example, `c:\Oracle Migration Tool On Demand\windows\repository\CustomRecordType\My CustomRecordType.xml`
- *CustomWebLinkXML* is the fully qualified path name of the custom Web link XML file, for example, `c:\My Files\MyCustomWebLink.xml`

- *CustomWebTabXML* is the fully qualified path name of the custom Web tab XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\CustomWebTab\My CustomWebTab.xml
- *DetailPageCustomWebAppletXML* is the fully qualified path name of the detail page customized Web applet XML file, for example, c:\My Files\MyDetailPageCustomWebApplet.xml
- *DynamicLayoutXML* is the fully qualified path name of the dynamic layout XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\DynamicLayout\Account.xml
- *EnableModificationTrackingXML* is the fully qualified path name of the modification tracking settings XML file, for example c:\Oracle Migration Tool On Demand\windows\repository\EnableModificationTracking\Account.xml
- *FieldAuditSetUpXML* is the fully qualified path name of the field audit setup XML file, for example c:\My Files\Account.xml
- *Field ManagementXML* is the fully qualified path name of the field management XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\FieldManagement\Account.xml
- *HomepageCustomWebAppletXML* is the fully qualified path name of the homepage customized Web applet XML file, for example, c:\My Files\MyHomePageCustomWebApplet.xml
- *HomepageLayoutXML* is the fully qualified path name of the homepage layout XML file, for example, c:\My Files\My HomepageLayout.xml
- *HomeTabCustomWebAppletXML* is the fully qualified path name of the Home tab customized Web applet XML file, for example, c:\My Files\MyHomeTabCustomWebApplet.xml
- *IntegrationEventQueueXML* is the fully qualified path name of the integration event queue XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\IntegrationEventQueue\MyIntegrationEventQueue.xml
- *LeadConversionMappingXML* is the fully qualified path name of the list access and order layout XML file, for example c:\Oracle Migration Tool On Demand\windows\repository\LeadConversionMapping\Account\Date of Birth.xml
- *ListAccessAndOrderXML* is the fully qualified path name of the list access and order layout XML file, for example c:\Oracle Migration Tool On Demand\windows\repository>ListAccessAndOrder\Account\ExpertRole.xml
- *PageLayoutFieldXML* is the fully qualified path name of the page layout field information XML file for a specific record type such as Account, for example, c:\My Files\PageLayoutFieldInformation\Account\AccountCustom.xml
- *PageLayoutRelatedXML* is the fully qualified path name of the page layout related information XML file for a specific record type such as Account, for example, c:\My Files\PageLayoutRelatedInformation\Account\AccountCustom.xml
- *PageLayoutSectionXML* is the fully qualified path name of the page layout section XML file for a specific record type such as Account, for example, c:\My Files\PageLayoutSection\Account\Account.xml
- *PicklistXML* is the fully qualified path name of the picklist XML file, for example, c:\Oracle Migration Tool On Demand\windows\repository\Picklist\Account.xml
- *PicklistValueGroupXML* is the fully qualified path name of the picklist value group XML file, for example, c:\My Files\MyPicklistValueGroup.xml
- *ProcessXML* is the fully qualified path name of the process administration XML file, for example, c:\My Files\Account.xml
- *RelatedInfoLayoutXML* is the fully qualified path name of the related information layout XML file, for example, c:\My Files\MyRelatedInfoLayout.xml
- *ReportFolderXML* is the fully qualified path name of the XML file containing the role associations for an analytics folder, for example, c:\Oracle Migration Tool On Demand\windows\repository\ReportFolder\MyFolder.xml



- *RoleXML* is the fully qualified path name of the role XML file, for example, `c:\My Files\MyRole.xml`
- *SalesAssessmentScriptXML* is the fully qualified path name of the sales assessment template XML file, for example, `c:\My Files\MyAssessmentScript.xml`
- *SalesCategoryXML* is the fully qualified path name of the sales category XML file, for example `c:\My Files\1.xml`
- *SalesProcessXML* is the fully qualified path name of the sales process XML file, for example `c:\My Files\High Potential.xml`
- *SalesStageXML* is the fully qualified path name of the sales stage XML file, for example `c:\My Files\Short List.xml`
- *SearchLayoutXML* is the fully qualified path name of the search layout XML file, for example `c:\Oracle Migration Tool On Demand\windows\repository\SearchLayout\Account\MyAccountSearchLayout.xml`
- *TransitionsStateXML* is the fully qualified path name of the process administration transition state XML file, for example, `c:\My Files\Assigned.xml`
- *WorkflowRulesXML* is the fully qualified path name of the workflow rules XML file, for example, `c:\My Files\My WorkflowRules.xml`
- *WorkflowActionSetXML* is the fully qualified path name of the workflow action set XML file, for example, `c:\My Files\My WorkflowActionSet.xml`
- *WorkflowUserSetXML* is the fully qualified path name of the workflow user set XML file, for example, `c:\My Files\My WorkflowUserSet.xml`

**Note:** The `Upsert` command must be run for each XML file that is retrieved from the source environment. For example, if ten access profile XML files are retrieved from the source, then ten Upsert operations (one for each XML file) are required.



# 37 Language Codes

## Language Codes

This appendix contains the following topic:

- *Language Codes and Their Corresponding Language and Country*

## Language Codes and Their Corresponding Language and Country

The following table information lists the three-letter language codes in Oracle CRM On Demand and their corresponding languages.

Three-Letter Language Code	Language and Country	Language Code	Language	Country
DEU	de_DE	de	German	Germany
ENG	en_GB	en	English	United Kingdom
ENU	en_US	en	English	United States
ESN	es_ES	es	Spanish	Spain
FRA	fr_FR	fr	French	France
ITA	it_IT	it	Italian	Italy
JPN	ja_JP	ja	Japanese	Japan
KOR	ko_KR	ko	Korean	Korea
PTG	pt_PT	pt	Portuguese	Portugal
THA	th_TH	th	Thai	Thailand
CHS	zh_CN	zh	Chinese (Simplified)	China
CHT	zh_TW	zh	Chinese (Traditional)	Taiwan

Three-Letter Language Code	Language and Country	Language Code	Language	Country
NLD	nl_NL	nl	Dutch	Netherlands
DAN	da_DK	da	Danish	Denmark
FIN	fi_FI	fi	Finnish	Finland
PLK	pl_PL	pl	Polish	Poland
RUS	ru_RU	ru	Russian	Russia
SVE	sv_SE	sv	Swedish	Sweden
PTB	pt_BR	pt	Portuguese	Brazil
NOR	no_NO	no	Norwegian	Norway
TUR	tr_TR	tr	Turkish	Turkey

# 38 Access Objects

## Access Objects

This appendix contains the following topics:

- [Access Objects and Corresponding Display Names](#)
- [Access Levels and Corresponding Permission Codes in the XML File](#)

## Access Objects and Corresponding Display Names

An *access object* in the access profile XML file is a top-level record type or a related record type for which a permission can be granted in the access profile. This topic provides details of the access object names as they appear in the access profile XML files and their corresponding display names in the user interface for Oracle CRM On Demand. The display names shown in this topic are the display names that appear in the English-American (ENU) user interface in the standard application.

### How to Read the Access Object Names and Corresponding ENU Display Names Table

In the *Access Object Names and Corresponding ENU Display Names* table in this topic, the access object names that do not have a parent (indicated by *Not applicable* in the Access Object Name of Parent column in the table) are the top-level record types. In the following example, the table entry refers to the Account record type, which is a top-level record type. The access object name for this record type in the access profile XML file is Account:

Access Object Name in the Access Profile XML File	Access Object Name of Parent	Display Name (ENU)	Object Type
Account	Not applicable	Account	Top

In the *Access Object Names and Corresponding ENU Display Names* table in this topic, the access object names for which a top-level record type is shown in the Access Object Name of Parent column of the table are the related record types for the top-level record types. In the following example, the table entry refers to the Addresses record type, which is a related record type for the Account record type. The access object name for this record type in the access profile XML file is Acct Address:

Access Object Name in the Access Profile XML File	Access Object Name of Parent	Display Name (ENU)	Object Type
Acct Address	Account	Addresses	Child

In the *Access Object Names and Corresponding ENU Display Names* table in this topic, if the access object is not a top-level record type, then the Object Type column indicates the type of relationship that the related record type has with the parent record type. The following abbreviations are used in the Object Type column in the table:

- 1-M (one-to-many)
- 1-M-Primary (one-to-many-primary)
- M-M (many-to-many)
- M-M-Primary (many-to-many-primary)

**Note:** Objects listed in the following table with parentheses appear with a space after the opening parenthesis, and before the closing parenthesis in the XML file. For example, Account CustomObject4 (Account Id) appears as Account CustomObject4 ( Account Id ) in the XML file.

The following table lists the access object names and their corresponding display names.

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Account	Not applicable	Account	Top
Account AccountEvent ( Account Id )	Account	Account Events	Child
Account Claim ( Business Account Id )	Account	Claims	1-M
Account CRMODLS_BPL_ACNT ( Account ID Id )	Account	Plan Accounts	1-M-PRIMARY
Account CRMODLS_BusinessPlan ( Account ID Id )	Account	Business Plans	1-M-PRIMARY
Account CRMODLS_OBJECTIVE ( Account Name Id )	Account	Objectives	1-M-PRIMARY
Account CustomObject10 ( Account Id )	Account	Custom Objects 10	1-M-PRIMARY
Account CustomObject11 ( Account Id )	Account	Custom Objects 11	1-M-PRIMARY
Account CustomObject12 ( Account Id )	Account	Custom Objects 12	1-M-PRIMARY
Account CustomObject13 ( Account Id )	Account	Custom Objects 13	1-M-PRIMARY
Account CustomObject14 ( Account Id )	Account	Custom Objects 14	1-M-PRIMARY
Account CustomObject15 ( Account Id )	Account	Custom Objects 15	1-M-PRIMARY
Account CustomObject4 ( Account Id )	Account	Custom Objects 04	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Account CustomObject5 ( Account Id )	Account	Custom Objects 05	1-M-PRIMARY
Account CustomObject6 ( Account Id )	Account	Custom Objects 06	1-M-PRIMARY
Account CustomObject7 ( Account Id )	Account	Custom Objects 07	1-M-PRIMARY
Account CustomObject8 ( Account Id )	Account	Custom Objects 08	1-M-PRIMARY
Account CustomObject9 ( Account Id )	Account	Custom Objects 09	1-M-PRIMARY
Account DealRegistration ( Customer Id )	Account	Deal Registrations	1-M
Account FinancialAccount ( Branch Id )	Account	Financial Account: Branch	1-M-PRIMARY
Account FinancialAccount ( Business Account Id )	Account	Financial Accounts	1-M-PRIMARY
Account FinancialAccount ( Held Away Institution Id )	Account	Financial Account: Held Away Institution	1-M-PRIMARY
Account FinancialAccountHolder ( Business Account Id )	Account	Financial Account Holders	1-M
Account FinancialPlan ( Business Account Id )	Account	Financial Plans	1-M
Account Order ( Business Account Id )	Account	Orders	1-M
Account Policy ( Business Account Id )	Account	Policies	1-M
Account PolicyHolder ( Business Account Holder Id )	Account	Policy Holders	1-M
Account Quote ( Business Account Id )	Account	Quotes	1-M
Account SampleRequest ( Business Account Id )	Account	Sample Requests	1-M
Account SPRequest ( End Customer Id )	Account	Special Pricing Requests	1-M
Account/Audit Trail Item 2	Account	Audit Trail	ReadOnly
AccountEvent	Not applicable	Account Event	Top
AccountEvent/Audit Trail Item 2	AccountEvent	Audit Trail	ReadOnly

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Accreditation	Not applicable	Accreditations	Top
Accreditation AccreditationAttachment ( Accreditation Id )	Accreditation	Accreditation Attachments	Child
Accreditation AccreditationCertification ( Accreditation Id )	Accreditation	Accreditation Certifications	Child
Accreditation AccreditationProduct ( Accreditation Id )	Accreditation	Accreditation Products	Child
Accreditation AccreditationProductCategory ( Accreditation Id )	Accreditation	Accreditation Product Product Categories	Child
Accreditation AccreditationRelationship ( Accreditation Id )	Accreditation	Related Accreditations	Child
Accreditation AccreditationRequest ( Accreditation Id )	Accreditation	Accreditation Requests	1-M-PRIMARY
Accreditation AccreditationSolution ( Accreditation Id )	Accreditation	Accreditation Solutions	Child
Accreditation Custom Object 1 ( Accreditation Id )	Accreditation	Custom Objects 01	1-M-PRIMARY
Accreditation Custom Object 2 ( Accreditation Id )	Accreditation	Custom Objects 02	1-M-PRIMARY
Accreditation Custom Object 3 ( Accreditation Id )	Accreditation	Custom Objects 03	1-M-PRIMARY
Accreditation CustomObject10 ( Accreditation Id )	Accreditation	Custom Objects 10	1-M-PRIMARY
Accreditation CustomObject11 ( Accreditation Id )	Accreditation	Custom Objects 11	1-M-PRIMARY
Accreditation CustomObject12 ( Accreditation Id )	Accreditation	Custom Objects 12	1-M-PRIMARY
Accreditation CustomObject13 ( Accreditation Id )	Accreditation	Custom Objects 13	1-M-PRIMARY
Accreditation CustomObject14 ( Accreditation Id )	Accreditation	Custom Objects 14	1-M-PRIMARY
Accreditation CustomObject15 ( Accreditation Id )	Accreditation	Custom Objects 15	1-M-PRIMARY
Accreditation CustomObject4 ( Accreditation Id )	Accreditation	Custom Objects 04	1-M-PRIMARY



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Accreditation CustomObject5 ( Accreditation Id )	Accreditation	Custom Objects 05	1-M-PRIMARY
Accreditation CustomObject6 ( Accreditation Id )	Accreditation	Custom Objects 06	1-M-PRIMARY
Accreditation CustomObject7 ( Accreditation Id )	Accreditation	Custom Objects 07	1-M-PRIMARY
Accreditation CustomObject8 ( Accreditation Id )	Accreditation	Custom Objects 08	1-M-PRIMARY
Accreditation CustomObject9 ( Accreditation Id )	Accreditation	Custom Objects 09	1-M-PRIMARY
Accreditation/Accreditation Book	Accreditation	Books	Child
Accreditation/AccreditationTeam	Accreditation	Accreditation Teams	Child
Accreditation/Audit Trail Item 2	Accreditation	Audit Trail	ReadOnly
AccreditationAttachment	Not applicable	Accreditation Attachments	Top
AccreditationCertification	Not applicable	Accreditation Certifications	Top
AccreditationProduct	Not applicable	Accreditation Products	Top
AccreditationProductCategory	Not applicable	Accreditation Product Product Categories	Top
AccreditationRelationship	Not applicable	Related Accreditations	Top
AccreditationRequest	Not applicable	Accreditation Requests	Top
AccreditationSolution	Not applicable	Accreditation Solutions	Top
Acct Address	Account	Addresses	Child
Acct Asset	Account	Assets	1-M
Acct Att	Account	Attachments	Child
Acct Book	Account	Books	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Acct Call	Account	Calls	1-M-PRIMARY
Acct Cmpltd Activity	Account	Completed Activities	1-M-PRIMARY
Acct Competitor	Account	Account Competitors	Child
Acct Contact	Account	Contacts	M-M
Acct CustObj1	Account	Custom Objects 01	M-M-PRIMARY
Acct CustObj2	Account	Custom Objects 02	M-M-PRIMARY
Acct CustObj3	Account	Custom Objects 03	M-M-PRIMARY
Acct Lead	Account	Leads	1-M-PRIMARY
Acct Note	Account	Notes	Child
Acct Open Activity	Account	Open Activities	1-M-PRIMARY
Acct Oppty	Account	Opportunities	1-M-PRIMARY
Acct Partner	Account	Account Partners	Child
Acct Portfolio	Account	Portfolios	1-M
Acct Rel	Account	Account Relationships	Child
Acct Revenue	Account	Revenues	Child
Acct Sales Assmt	Account	Assessments	1-M
Acct SR	Account	Service Requests	1-M-PRIMARY
Acct Sub Acct	Account	Sub-Accounts	ReadOnly
Acct Team	Account	Account Team	Child
Acct Vehicle	Account	Vehicles	1-M
Action/Audit Trail Item 2	Activity	Audit Trail	ReadOnly

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Activity	Not applicable	Activity	Top
Activity Att	Activity	Attachments	Child
Activity Attendee Call	Activity	Attendee Call	1-M-PRIMARY
Activity Book	Activity	Books	Child
Activity Contact	Activity	Contacts	M-M
Activity CRMOD_LS_Transactions ( Activity Id )	Activity	Sample Transactions	1-M
Activity CRMODLS_PCD_MSGRSP ( Activity Id )	Activity	Message Responses	1-M-PRIMARY
Activity CRMODLS_Signature ( Activity Id )	Activity	Signature	Child
Activity CustObj1	Activity	Custom Objects 01	M-M-PRIMARY
Activity CustObj2	Activity	Custom Objects 02	M-M-PRIMARY
Activity CustObj3	Activity	Custom Objects 03	M-M-PRIMARY
Activity CustomObject10 ( Activity Id )	Activity	Custom Objects 10	1-M-PRIMARY
Activity CustomObject11 ( Activity Id )	Activity	Custom Objects 11	1-M-PRIMARY
Activity CustomObject12 ( Activity Id )	Activity	Custom Objects 12	1-M-PRIMARY
Activity CustomObject13 ( Activity Id )	Activity	Custom Objects 13	1-M-PRIMARY
Activity CustomObject14 ( Activity Id )	Activity	Custom Objects 14	1-M-PRIMARY
Activity CustomObject15 ( Activity Id )	Activity	Custom Objects 15	1-M-PRIMARY
Activity CustomObject4 ( Activity Id )	Activity	Custom Objects 04	1-M-PRIMARY
Activity CustomObject5 ( Activity Id )	Activity	Custom Objects 05	1-M-PRIMARY
Activity CustomObject6 ( Activity Id )	Activity	Custom Objects 06	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Activity CustomObject7 ( Activity Id )	Activity	Custom Objects 07	1-M-PRIMARY
Activity CustomObject8 ( Activity Id )	Activity	Custom Objects 08	1-M-PRIMARY
Activity CustomObject9 ( Activity Id )	Activity	Custom Objects 09	1-M-PRIMARY
Activity Fund Request ( Activity Id )	Activity	Fund Requests	1-M
Activity MessagePlanVBC	Activity	Available Message Plans	Child
Activity Order ( Activity Id )	Activity	Orders	1-M
Activity Prod Detail	Activity	Products Detailed	Child
Activity Prod DetailVBC	Activity	Available Product Detailed	Child
Activity PromItem Drop	Activity	Promotional Item Dropped	Child
Activity Promo DropVBC	Activity	Available Promotional Item Dropped	Child
Activity Sales Assmt	Activity	Activity Assessment	1-M
Activity Samp Drop	Activity	Samples Dropped	Child
Activity Samp DropVBC	Activity	Available Sample Dropped	Child
Activity SampleRequest ( Activity Id )	Activity	Sample Requests	1-M
Activity Soln	Activity	Solutions	M-M
Activity Team	Activity	Users	M-M
Address	Not applicable	Address Locations	Top
Application	Not applicable	Application	Top
Application Activity ( Application Id )	Application	Activities	1-M-PRIMARY
Application ApplicationAttachment ( Application Id )	Application	Application Attachments	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Application Cmpltd Activity	Application	Completed Activities	1-M-PRIMARY
Application SmartCall ( Application Id )	Application	Smart Calls	1-M
Application/Application Book	Application	Books	Child
Application/ApplicationTeam	Application	Application Teams	Child
Application/Audit Trail Item 2	Application	Audit Trail	ReadOnly
ApplicationAttachment	Not applicable	Application Attachments	Top
Asset	Not applicable	Asset	Top
Asset CustObj1	Asset	Custom Objects 01	M-M-PRIMARY
Asset CustObj2	Asset	Custom Objects 02	M-M-PRIMARY
Asset CustObj3	Asset	Custom Objects 03	M-M-PRIMARY
Asset CustomObject4 ( Asset Id )	Asset	Custom Objects 04	1-M-PRIMARY
Asset CustomObject5 ( Asset Id )	Asset	Custom Objects 05	1-M-PRIMARY
Asset CustomObject6 ( Asset Id )	Asset	Custom Objects 06	1-M-PRIMARY
Asset CustomObject7 ( Asset Id )	Asset	Custom Objects 07	1-M-PRIMARY
Asset CustomObject8 ( Asset Id )	Asset	Custom Objects 08	1-M-PRIMARY
Asset CustomObject9 ( Asset Id )	Asset	Custom Objects 09	1-M-PRIMARY
Asset CustomObject10 ( Asset Id )	Asset	Custom Objects 10	1-M-PRIMARY
Asset CustomObject11 ( Asset Id )	Asset	Custom Objects 11	1-M-PRIMARY
Asset CustomObject12 ( Asset Id )	Asset	Custom Objects 12	1-M-PRIMARY
Asset CustomObject13 ( Asset Id )	Asset	Custom Objects 13	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Asset CustomObject14 ( Asset Id )	Asset	Custom Objects 14	1-M-PRIMARY
Asset CustomObject15 ( Asset Id )	Asset	Custom Objects 15	1-M-PRIMARY
Asset Mgmt - Asset/Asset Association Book	Asset	Books	Child
Asset Mgmt - Asset/Audit Trail Item 2	Asset	Audit Trail	ReadOnly
Asset Service Request ( Asset Id )	Asset	Service Requests	1-M-PRIMARY
Auto Vehicle/Audit Trail Item 2	Vehicle	Audit Trail	ReadOnly
Auto Vehicle/Auto Vehicle Book	Vehicle	Books	Child
BlockedProduct	Not applicable	Blocked Products	Top
BlockedProduct/Audit Trail Item 2	BlockedProduct	Audit Trail	ReadOnly
Book	Not applicable	Books	Top
Book Sub-Book	Book	Sub-Books	1-M
Book User	Book	Users	Child
BP Sales Assmt	CRMODLS_ BusinessPlan	Assessments	1-M
BrokerProfile	Not applicable	Broker Profiles	Top
BrokerProfile Custom Object 1 ( Broker Profile Id )	BrokerProfile	Custom Objects 01	1-M-PRIMARY
BrokerProfile Custom Object 2 ( Broker Profile Id )	BrokerProfile	Custom Objects 02	1-M-PRIMARY
BrokerProfile Custom Object 3 ( Broker Profile Id )	BrokerProfile	Custom Objects 03	1-M-PRIMARY
BrokerProfile CustomObject10 ( Broker Profile Id )	BrokerProfile	Custom Objects 10	1-M-PRIMARY
BrokerProfile CustomObject11 ( Broker Profile Id )	BrokerProfile	Custom Objects 11	1-M-PRIMARY
BrokerProfile CustomObject12 ( Broker Profile Id )	BrokerProfile	Custom Objects 12	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
BrokerProfile CustomObject13 ( Broker Profile Id )	BrokerProfile	Custom Objects 13	1-M-PRIMARY
BrokerProfile CustomObject14 ( Broker Profile Id )	BrokerProfile	Custom Objects 14	1-M-PRIMARY
BrokerProfile CustomObject15 ( Broker Profile Id )	BrokerProfile	Custom Objects 15	1-M-PRIMARY
BrokerProfile CustomObject4 ( Broker Profile Id )	BrokerProfile	Custom Objects 04	1-M-PRIMARY
BrokerProfile CustomObject5 ( Broker Profile Id )	BrokerProfile	Custom Objects 05	1-M-PRIMARY
BrokerProfile CustomObject6 ( Broker Profile Id )	BrokerProfile	Custom Objects 06	1-M-PRIMARY
BrokerProfile CustomObject7 ( Broker Profile Id )	BrokerProfile	Custom Objects 07	1-M-PRIMARY
BrokerProfile CustomObject8 ( Broker Profile Id )	BrokerProfile	Custom Objects 08	1-M-PRIMARY
BrokerProfile CustomObject9 ( Broker Profile Id )	BrokerProfile	Custom Objects 09	1-M-PRIMARY
BrokerProfile/Audit Trail Item 2	BrokerProfile	Audit Trail	ReadOnly
Bulk Data Load	Not applicable	Bulk Data Load	Top
Call ProdDetail	Not applicable	Products Detailed	Top
Call ProdDetail CallProdDetail_MsgPlanItem ( Product Detailed Id )	Call ProdDetail	Call Product Detail Messaging Plan Items	1-M-PRIMARY
Call ProdDetail CallProdDetail_MsgPlnRel ( Product Detailed Id )	Call ProdDetail	Call Product Detail Messaging Plan Item Relations	1-M-PRIMARY
Call ProdDetail CallProdDetail_MsgRsp ( Product Detailed Id )	Call ProdDetail	Call Product Detail Message Responses	1-M-PRIMARY
CallProdDetail_MsgPlanItem	Not applicable	Call Product Detail Messaging Plan Items	Top
CallProdDetail_MsgPlnRel	Not applicable	Call Product Detail Messaging Plan Item Relations	Top
CallProdDetail_MsgRsp	Not applicable	Call Product Detail Message Responses	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Camp Att	Campaign	Attachments	Child
Camp Cmpltd Activity	Campaign	Completed Activities	1-M-PRIMARY
Camp Contact	Campaign	Contacts	1-M
Camp CustObj1	Campaign	Custom Objects 01	M-M-PRIMARY
Camp CustObj2	Campaign	Custom Objects 02	M-M-PRIMARY
Camp CustObj3	Campaign	Custom Objects 03	M-M-PRIMARY
Camp Lead	Campaign	Leads	1-M-PRIMARY
Camp Note	Campaign	Notes	Child
Camp Open Activity	Campaign	Open Activities	1-M-PRIMARY
Camp Oppty	Campaign	Opportunities	M-M-PRIMARY
Campaign	Not applicable	Campaign	Top
Campaign Application ( Campaign Id )	Campaign	Applications	1-M
Campaign CustomObject10 ( Campaign Id )	Campaign	Custom Objects 10	1-M-PRIMARY
Campaign CustomObject11 ( Campaign Id )	Campaign	Custom Objects 11	1-M-PRIMARY
Campaign CustomObject12 ( Campaign Id )	Campaign	Custom Objects 12	1-M-PRIMARY
Campaign CustomObject13 ( Campaign Id )	Campaign	Custom Objects 13	1-M-PRIMARY
Campaign CustomObject14 ( Campaign Id )	Campaign	Custom Objects 14	1-M-PRIMARY
Campaign CustomObject15 ( Campaign Id )	Campaign	Custom Objects 15	1-M-PRIMARY
Campaign CustomObject4 ( Campaign Id )	Campaign	Custom Objects 04	1-M-PRIMARY
Campaign CustomObject5 ( Campaign Id )	Campaign	Custom Objects 05	1-M-PRIMARY
Campaign CustomObject6 ( Campaign Id )	Campaign	Custom Objects 06	1-M-PRIMARY



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Campaign CustomObject7 ( Campaign Id )	Campaign	Custom Objects 07	1-M-PRIMARY
Campaign CustomObject8 ( Campaign Id )	Campaign	Custom Objects 08	1-M-PRIMARY
Campaign CustomObject9 ( Campaign Id )	Campaign	Custom Objects 09	1-M-PRIMARY
Campaign FinancialAccount ( Campaign Id )	Campaign	Financial Accounts	1-M-PRIMARY
Campaign FinancialPlan ( Campaign Id )	Campaign	Financial Plans	1-M
Campaign MDFRequest ( Campaign Id )	Campaign	MDF Requests	1-M
Campaign MedEdEvent ( Campaign Id )	Campaign	Events	1-M
Campaign PartnerCampaign ( Campaign Id )	Campaign	Partner Campaigns	Child
Campaign Policy ( Campaign Id )	Campaign	Policies	1-M
Campaign/Audit Trail Item 2	Campaign	Audit Trail	ReadOnly
Campaign/Campaign Book	Campaign	Books	Child
Certification	Not applicable	Certifications	Top
Certification AccreditationCertification ( Certification Id )	Certification	Accreditation Certifications	Child
Certification CertificationAttachment ( Certification Id )	Certification	Certification Attachments	Child
Certification CertificationCourse ( Certification Id )	Certification	Certification Courses	Child
Certification CertificationExam ( Certification Id )	Certification	Certification Exams	Child
Certification CertificationProduct ( Certification Id )	Certification	Certification Products	Child
Certification CertificationProductCategory ( Certification Id )	Certification	Certification Product Product Categories	Child
Certification CertificationRelationship ( Certification Id )	Certification	Related Certifications	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Certification CertificationRequest ( Certification Id )	Certification	Certification Requests	1-M-PRIMARY
Certification CertificationSolution ( Certification Id )	Certification	Certification Solutions	Child
Certification Custom Object 1 ( Certification Id )	Certification	Custom Objects 01	1-M-PRIMARY
Certification Custom Object 2 ( Certification Id )	Certification	Custom Objects 02	1-M-PRIMARY
Certification Custom Object 3 ( Certification Id )	Certification	Custom Objects 03	1-M-PRIMARY
Certification CustomObject10 ( Certification Id )	Certification	Custom Objects 10	1-M-PRIMARY
Certification CustomObject11 ( Certification Id )	Certification	Custom Objects 11	1-M-PRIMARY
Certification CustomObject12 ( Certification Id )	Certification	Custom Objects 12	1-M-PRIMARY
Certification CustomObject13 ( Certification Id )	Certification	Custom Objects 13	1-M-PRIMARY
Certification CustomObject14 ( Certification Id )	Certification	Custom Objects 14	1-M-PRIMARY
Certification CustomObject15 ( Certification Id )	Certification	Custom Objects 15	1-M-PRIMARY
Certification CustomObject4 ( Certification Id )	Certification	Custom Objects 04	1-M-PRIMARY
Certification CustomObject5 ( Certification Id )	Certification	Custom Objects 05	1-M-PRIMARY
Certification CustomObject6 ( Certification Id )	Certification	Custom Objects 06	1-M-PRIMARY
Certification CustomObject7 ( Certification Id )	Certification	Custom Objects 07	1-M-PRIMARY
Certification CustomObject8 ( Certification Id )	Certification	Custom Objects 08	1-M-PRIMARY
Certification CustomObject9 ( Certification Id )	Certification	Custom Objects 09	1-M-PRIMARY
Certification/Audit Trail Item 2	Certification	Audit Trail	ReadOnly
Certification/Certification Book	Certification	Books	Child
Certification/CertificationTeam	Certification	Certification Teams	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CertificationAttachment	Not applicable	Certification Attachments	Top
CertificationCourse	Not applicable	Certification Courses	Top
CertificationExam	Not applicable	Certification Exams	Top
CertificationProduct	Not applicable	Certification Products	Top
CertificationProductCategory	Not applicable	Certification Product Product Categories	Top
CertificationRelationship	Not applicable	Related Certifications	Top
CertificationRequest	Not applicable	Certification Requests	Top
CertificationSolution	Not applicable	Certification Solutions	Top
Channel Partner CustomObject10 ( Dealer Id )	Dealer	Custom Objects 10	1-M-PRIMARY
Channel Partner CustomObject11 ( Dealer Id )	Dealer	Custom Objects 11	1-M-PRIMARY
Channel Partner CustomObject12 ( Dealer Id )	Dealer	Custom Objects 12	1-M-PRIMARY
Channel Partner CustomObject13 ( Dealer Id )	Dealer	Custom Objects 13	1-M-PRIMARY
Channel Partner CustomObject14 ( Dealer Id )	Dealer	Custom Objects 14	1-M-PRIMARY
Channel Partner CustomObject15 ( Dealer Id )	Dealer	Custom Objects 15	1-M-PRIMARY
Channel Partner CustomObject4 ( Dealer Id )	Dealer	Custom Objects 04	1-M-PRIMARY
Channel Partner CustomObject5 ( Dealer Id )	Dealer	Custom Objects 05	1-M-PRIMARY
Channel Partner CustomObject6 ( Dealer Id )	Dealer	Custom Objects 06	1-M-PRIMARY
Channel Partner CustomObject7 ( Dealer Id )	Dealer	Custom Objects 07	1-M-PRIMARY
Channel Partner CustomObject8 ( Dealer Id )	Dealer	Custom Objects 08	1-M-PRIMARY
Channel Partner CustomObject9 ( Dealer Id )	Dealer	Custom Objects 09	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Channel Partner/Audit Trail Item 2	Dealer	Audit Trail	ReadOnly
Claim	Not applicable	Claims	Top
Claim Activity ( Claim Id )	Claim	Activities	1-M-PRIMARY
Claim Cmpltd Activity	Claim	Completed Activities	1-M-PRIMARY
Claim Damage ( Claim Id )	Claim	Damages	1-M
Claim InvolvedParty ( Claim Id )	Claim	Involved Parties	1-M
Claim Service Request ( Claim Id )	Claim	Service Requests	1-M-PRIMARY
Claim SmartCall ( Claim Id )	Claim	Smart Calls	1-M
Claim/Audit Trail Item 2	Claim	Audit Trail	ReadOnly
Company	Not applicable	Companies	Top
Contact	Not applicable	Contact	Top
Contact Accreditation ( Contact Id )	Contact	Accreditations	1-M
Contact Acct	Contact	Accounts	M-M
Contact Addr	Contact	Addresses	Child
Contact Asset	Contact	Assets	M-M
Contact Att	Contact	Attachments	Child
Contact BlockedProduct ( Contact Id )	Contact	Blocked Products	1-M
Contact Book	Contact	Books	Child
Contact Call	Contact	Calls	M-M-PRIMARY
Contact Camp	Contact	Campaigns	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Contact Certification ( Contact Id )	Contact	Certifications	1-M
Contact CertificationRequest ( Contact Id )	Contact	Certification Requests	1-M-PRIMARY
Contact Claim ( Contact Id )	Contact	Claims	1-M
Contact Cmpltd Activity	Contact	Completed Activities	M-M-PRIMARY
Contact Course ( Contact Id )	Contact	Courses	1-M
Contact CourseEnrollment ( Candidate Id )	Contact	Course Enrollments	1-M-PRIMARY
Contact Coverage ( Contact Id )	Contact	Coverages	1-M
Contact CRMOD_LS_ContactLicenses ( Contact Id )	Contact	Contact State Licenses	1-M
Contact CRMOD_LS_Transactions ( Contact Id )	Contact	Sample Transactions	1-M
Contact CRMODLS_BPL_CNTCT ( Contact Id )	Contact	Plan Contacts	1-M-PRIMARY
Contact CRMODLS_OBJECTIVE ( Contact Name Id )	Contact	Objectives	1-M-PRIMARY
Contact CRMODLS_Signature ( Contact Id )	Contact	Signature	Child
Contact CustObj1	Contact	Custom Objects 01	M-M-PRIMARY
Contact CustObj2	Contact	Custom Objects 02	M-M-PRIMARY
Contact CustObj3	Contact	Custom Objects 03	M-M-PRIMARY
Contact CustomObject10 ( Contact Id )	Contact	Custom Objects 10	1-M-PRIMARY
Contact CustomObject11 ( Contact Id )	Contact	Custom Objects 11	1-M-PRIMARY
Contact CustomObject12 ( Contact Id )	Contact	Custom Objects 12	1-M-PRIMARY
Contact CustomObject13 ( Contact Id )	Contact	Custom Objects 13	1-M-PRIMARY
Contact CustomObject14 ( Contact Id )	Contact	Custom Objects 14	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Contact CustomObject15 ( Contact Id )	Contact	Custom Objects 15	1-M-PRIMARY
Contact CustomObject4 ( Contact Id )	Contact	Custom Objects 04	1-M-PRIMARY
Contact CustomObject5 ( Contact Id )	Contact	Custom Objects 05	1-M-PRIMARY
Contact CustomObject6 ( Contact Id )	Contact	Custom Objects 06	1-M-PRIMARY
Contact CustomObject7 ( Contact Id )	Contact	Custom Objects 07	1-M-PRIMARY
Contact CustomObject8 ( Contact Id )	Contact	Custom Objects 08	1-M-PRIMARY
Contact CustomObject9 ( Contact Id )	Contact	Custom Objects 09	1-M-PRIMARY
Contact DealRegistration ( Associated Contact Id )	Contact	Deal Registrations	1-M
Contact Exam ( Contact Id )	Contact	Exams	1-M
Contact ExamRegistration ( Candidate Id )	Contact	Exam Registrations	1-M-PRIMARY
Contact FinancialAccount ( Account Holder Id )	Contact	Financial Account: Account Holder	1-M-PRIMARY
Contact FinancialAccount ( Financial Advisor Id )	Contact	Financial Accounts	1-M-PRIMARY
Contact FinancialAccountHolder ( Financial Account Holder Id )	Contact	Financial Account Holders	1-M
Contact FinancialPlan ( Contact Id )	Contact	Financial Plans	1-M
Contact HCPContactAllocation ( Contact Id )	Contact	HCP Contact Allocations	1-M
Contact Household	Contact	Households	M-M
Contact Interest	Contact	Contact Interests	Child
Contact InvolvedParty ( Contact Id )	Contact	Involved Parties	1-M
Contact Lead	Contact	Leads	1-M-PRIMARY
Contact Med Ed	Contact	Event	ReadOnly

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Contact Note	Contact	Notes	Child
Contact Open Activity	Contact	Open Activities	M-M-PRIMARY
Contact Oppty	Contact	Opportunities	M-M-PRIMARY
Contact Order ( Contact Id )	Contact	Orders	1-M
Contact Policy ( Carrier Underwriter Id )	Contact	Policies	1-M
Contact Policy ( Primary Agent Id )	Contact	Policies	1-M
Contact PolicyHolder ( Contact Holder Id )	Contact	Policy Holders	1-M
Contact Portfolio	Contact	Portfolios	Child
Contact Referrals	Contact	Referrals	1-M
Contact Rel	Contact	Contact Relationships	Child
Contact Revenue	Contact	Revenues	Child
Contact Sales Assmt	Contact	Contact Assessment	1-M
Contact SampleRequest ( Contact Id )	Contact	Sample Requests	1-M
Contact SocialProfile ( Contact Id )	Contact	Social Profiles	1-M
Contact SR	Contact	Service Requests	1-M-PRIMARY
Contact Team	Contact	Contact Team	Child
Contact Vehicle	Contact	Vehicles	M-M
Contact/Audit Trail Item 2	Contact	Audit Trail	ReadOnly
ContactBestTimes	Contact	Contact Best Times	Child
Course	Not applicable	Courses	Top
Course CertificationCourse ( Course Id )	Course	Certification Courses	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Course CourseAttachment ( Course Id )	Course	Course Attachments	Child
Course CourseCategory ( Course Id )	Course	Course Product Product Categories	Child
Course CourseEnrollment ( Course Id )	Course	Course Enrollments	1-M-PRIMARY
Course CourseExam ( Course Id )	Course	Course Exams	Child
Course CoursePartner ( Course Id )	Course	Course Partners	Child
Course CourseProduct ( Course Id )	Course	Course Products	Child
Course CourseRelationship ( Course Id )	Course	Related Courses	Child
Course CourseSolution ( Course Id )	Course	Course Solutions	Child
Course Custom Object 1 ( Course Id )	Course	Custom Objects 01	1-M-PRIMARY
Course Custom Object 2 ( Course Id )	Course	Custom Objects 02	1-M-PRIMARY
Course Custom Object 3 ( Course Id )	Course	Custom Objects 03	1-M-PRIMARY
Course CustomObject10 ( Course Id )	Course	Custom Objects 10	1-M-PRIMARY
Course CustomObject11 ( Course Id )	Course	Custom Objects 11	1-M-PRIMARY
Course CustomObject12 ( Course Id )	Course	Custom Objects 12	1-M-PRIMARY
Course CustomObject13 ( Course Id )	Course	Custom Objects 13	1-M-PRIMARY
Course CustomObject14 ( Course Id )	Course	Custom Objects 14	1-M-PRIMARY
Course CustomObject15 ( Course Id )	Course	Custom Objects 15	1-M-PRIMARY
Course CustomObject4 ( Course Id )	Course	Custom Objects 04	1-M-PRIMARY
Course CustomObject5 ( Course Id )	Course	Custom Objects 05	1-M-PRIMARY
Course CustomObject6 ( Course Id )	Course	Custom Objects 06	1-M-PRIMARY



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Course CustomObject7 ( Course Id )	Course	Custom Objects 07	1-M-PRIMARY
Course CustomObject8 ( Course Id )	Course	Custom Objects 08	1-M-PRIMARY
Course CustomObject9 ( Course Id )	Course	Custom Objects 09	1-M-PRIMARY
Course/Audit Trail Item 2	Course	Audit Trail	ReadOnly
Course/Course Book	Course	Books	Child
Course/CourseTeam	Course	Course Teams	Child
CourseAttachment	Not applicable	Course Attachments	Top
CourseCategory	Not applicable	Course Product Product Categories	Top
CourseEnrollment	Not applicable	Course Enrollments	Top
CourseExam	Not applicable	Course Exams	Top
CoursePartner	Not applicable	Course Partners	Top
CourseProduct	Not applicable	Course Products	Top
CourseRelationship	Not applicable	Related Courses	Top
CourseSolution	Not applicable	Course Solutions	Top
Coverage	Not applicable	Coverages	Top
Coverage/Audit Trail Item 2	Coverage	Audit Trail	ReadOnly
CRMOD_LS_Allocation	Not applicable	Allocations	Top
CRMOD_LS_Allocation/Audit Trail Item 2	CRMOD_LS_Allocation	Audit Trail	ReadOnly
CRMOD_LS_Allocation/CRMOD_LS_Allocation Book	CRMOD_LS_Allocation	Books	Child
CRMOD_LS_ContactLicenses	Not applicable	Contact State Licenses	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_ContactLicenses/Audit Trail Item 2	CRMOD_LS_Contact Licenses	Audit Trail	ReadOnly
CRMOD_LS_Messaging Plan	Not applicable	Messaging Plans	Top
CRMOD_LS_MessagingPlan CRMODLS_MsgPlanItem ( Parent Message Plan Id )	CRMOD_LS_Messaging Plan	Messaging Plan Items	1-M-PRIMARY
CRMOD_LS_MessagingPlan CRMODLS_BusinessPlan ( Message Plan Id )	CRMOD_LS_Messaging Plan	Business Plans	1-M-PRIMARY
CRMOD_LS_MessagingPlan CRMODLS_PCD_MSGRSP ( Plan Id )	CRMOD_LS_Messaging Plan	Message Responses	1-M-PRIMARY
CRMOD_LS_MessagingPlan Custom Object 1 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 01	1-M-PRIMARY
CRMOD_LS_MessagingPlan Custom Object 2 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 02	1-M-PRIMARY
CRMOD_LS_MessagingPlan Custom Object 3 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 03	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject10 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 10	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject11 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 11	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject12 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 12	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject13 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 13	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject14 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 14	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject15 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 15	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject4 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 04	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_MessagingPlan CustomObject5 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 05	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject6 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 06	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject7 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 07	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject8 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 08	1-M-PRIMARY
CRMOD_LS_MessagingPlan CustomObject9 ( Plan Id )	CRMOD_LS_Messaging Plan	Custom Objects 09	1-M-PRIMARY
CRMOD_LS_MessagingPlan/Audit Trail Item 2	CRMOD_LS_Messaging Plan	Audit Trail	ReadOnly
CRMOD_LS_MessagingPlan/CRMOD_LS_MessagingPlan Book	CRMOD_LS_Messaging Plan	Books	Child
CRMOD_LS_MsgPlanItem	Not applicable	Messaging Plan Items	Top
CRMOD_LS_MsgPlanItem CallProdDetail_MsgPlanItem ( Messaging Plan Item Id )	CRMOD_LS_MsgPlan Item	Call Product Detail Messaging Plan Items	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CRMOD_LS_MsgPlnRel ( Parent MP Item Id )	CRMOD_LS_MsgPlan Item	Messaging Plan Item Relations	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CRMODLS_PCD_MSGRSP ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Message Responses	1-M-PRIMARY
CRMOD_LS_MsgPlanItem Custom Object 1 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 01	1-M-PRIMARY
CRMOD_LS_MsgPlanItem Custom Object 2 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 02	1-M-PRIMARY
CRMOD_LS_MsgPlanItem Custom Object 3 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 03	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject10 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 10	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject11 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 11	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_MsgPlanItem CustomObject12 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 12	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject13 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 13	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject14 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 14	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject15 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 15	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject4 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 04	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject5 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 05	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject6 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 06	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject7 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 07	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject8 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 08	1-M-PRIMARY
CRMOD_LS_MsgPlanItem CustomObject9 ( Plan Item Id )	CRMOD_LS_MsgPlan Item	Custom Objects 09	1-M-PRIMARY
CRMOD_LS_MsgPlanItem/Audit Trail Item 2	CRMOD_LS_MsgPlan Item	Audit Trail	ReadOnly
CRMOD_LS_MsgPlnRel	Not applicable	Messaging Plan Item Relations	Top
CRMOD_LS_MsgPlnRel CallProdDetail_MsgPlnRel ( Message Plan Item Rel Id )	CRMOD_LS_Msg PlnRel	Call Product Detail Messaging Plan Item Relations	1-M-PRIMARY
CRMOD_LS_MsgPlnRel Custom Object 1 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 01	1-M-PRIMARY
CRMOD_LS_MsgPlnRel Custom Object 2 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 02	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_MsgPlnRel Custom Object 3 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 03	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject10 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 10	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject11 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 11	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject12 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 12	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject13 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 13	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject14 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 14	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject15 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 15	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject4 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 04	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject5 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 05	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject6 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 06	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject7 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 07	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject8 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 08	1-M-PRIMARY
CRMOD_LS_MsgPlnRel CustomObject9 ( Plan Item Relation Id )	CRMOD_LS_Msg PlnRel	Custom Objects 09	1-M-PRIMARY
CRMOD_LS_MsgPlnRel/Audit Trail Item 2	CRMOD_LS_Msg PlnRel	Audit Trail	ReadOnly
CRMOD_LS_TransactionItems	Not applicable	Transaction Items	Top
CRMOD_LS_Transactions	Not applicable	Sample Transactions	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_Transactions CRMOD_LS_TransactionItems ( Sample Transaction Id )	CRMOD_LS_Transactions	Transaction Items	1-M-PRIMARY
CRMOD_LS_Transactions Custom Object 1 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 01	1-M-PRIMARY
CRMOD_LS_Transactions Custom Object 2 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 02	1-M-PRIMARY
CRMOD_LS_Transactions Custom Object 3 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 03	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject10 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 10	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject11 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 11	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject12 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 12	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject13 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 13	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject14 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 14	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject15 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 15	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject4 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 04	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject5 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 05	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject6 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 06	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject7 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 07	1-M-PRIMARY
CRMOD_LS_Transactions CustomObject8 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 08	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMOD_LS_Transactions CustomObject9 ( Transaction Id )	CRMOD_LS_Transactions	Custom Objects 09	1-M-PRIMARY
CRMOD_LS_Transactions/Audit Trail Item 2	CRMOD_LS_Transactions	Audit Trail	ReadOnly
CRMOD_LS_Transactions/CRMOD_LS_Transactions Book	CRMOD_LS_Transactions	Books	Child
CRMODLS_BPL_ACNT	Not applicable	Plan Accounts	Top
CRMODLS_BPL_ACNT/Audit Trail Item 2	CRMODLS_BPL_ACNT	Audit Trail	ReadOnly
CRMODLS_BPL_CNTCT	Not applicable	Plan Contacts	Top
CRMODLS_BPL_CNTCT/Audit Trail Item 2	CRMODLS_BPL_CNTCT	Audit Trail	ReadOnly
CRMODLS_BusinessPlan	Not applicable	Business Plan	Top
CRMODLS_BusinessPlan AccreditationRequest ( Plan Id )	CRMODLS_BusinessPlan	Accreditation Requests	1-M-PRIMARY
CRMODLS_BusinessPlan Activity ( Business Plan Id )	CRMODLS_BusinessPlan	Activities	1-M-PRIMARY
CRMODLS_BusinessPlan CertificationRequest ( Plan Id )	CRMODLS_BusinessPlan	Certification Requests	1-M-PRIMARY
CRMODLS_BusinessPlan Cmpltd Activity	CRMODLS_BusinessPlan	Activities	1-M-PRIMARY
CRMODLS_BusinessPlan CRMOD_LS_MessagingPlan ( Business Plan Id )	CRMODLS_BusinessPlan	Messaging Plans	1-M
CRMODLS_BusinessPlan CRMODLS_BPL_ACNT ( Business Plan Id )	CRMODLS_BusinessPlan	Plan Accounts	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_BPL_CNTCT ( Business Plan Id )	CRMODLS_BusinessPlan	Plan Contacts	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_BusinessPlan ( Parent Plan Name Id )	CRMODLS_BusinessPlan	Business Plans	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_BusinessPlan CRMODLS_BusinessPlan_ATTACHMENT ( CRMODLS_BusinessPlan Id )	CRMODLS_BusinessPlan	Business Plan Attachments	Child
CRMODLS_BusinessPlan CRMODLS_OBJECTIVE ( Plan Name Id )	CRMODLS_BusinessPlan	Objectives	1-M-PRIMARY
CRMODLS_BusinessPlan CRMODLS_PlanOpportunities ( Plan Id )	CRMODLS_BusinessPlan	Plan Opportunities	1-M-PRIMARY
CRMODLS_BusinessPlan Custom Object 1 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 01	1-M-PRIMARY
CRMODLS_BusinessPlan Custom Object 2 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 02	1-M-PRIMARY
CRMODLS_BusinessPlan Custom Object 3 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 03	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject10 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 10	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject11 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 11	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject12 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 12	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject13 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 13	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject14 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 14	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject15 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 15	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject4 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 04	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject5 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 05	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject6 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 06	1-M-PRIMARY



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_BusinessPlan CustomObject7 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 07	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject8 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 08	1-M-PRIMARY
CRMODLS_BusinessPlan CustomObject9 ( Business Plan Id )	CRMODLS_BusinessPlan	Custom Objects 09	1-M-PRIMARY
CRMODLS_BusinessPlan MedEdEvent ( Business Plan Id )	CRMODLS_BusinessPlan	Events	1-M
CRMODLS_BusinessPlan PartnerPlan ( Plan Id )	CRMODLS_BusinessPlan	Partner Plans	Child
CRMODLS_BusinessPlan SmartCall ( Business Plan Id )	CRMODLS_BusinessPlan	Smart Calls	1-M
CRMODLS_BusinessPlan/Audit Trail Item 2	CRMODLS_BusinessPlan	Audit Trail	ReadOnly
CRMODLS_BusinessPlan/CRMODLS_BusinessPlan Book	CRMODLS_BusinessPlan	Books	Child
CRMODLS_BusinessPlan/CRMODLS_BusinessPlanTeam	CRMODLS_BusinessPlan	Business Plan Teams	Child
CRMODLS_BusinessPlan_ATTACHMENT	Not applicable	Business Plan Attachments	Top
CRMODLS_InventoryAuditReport	Not applicable	Inventory Audit Reports	Top
CRMODLS_InventoryAuditReport CRMODLS_SampleInventory ( Audit Report Id )	CRMODLS_Inventory AuditReport	Sample Inventory	Child
CRMODLS_InventoryAuditReport/Audit Trail Item 2	CRMODLS_Inventory AuditReport	Audit Trail	ReadOnly
CRMODLS_InventoryAuditReport/CRMODLS_InventoryAuditReport Book	CRMODLS_Inventory AuditReport	Books	Child
CRMODLS_InventoryPeriod	Not applicable	Inventory Periods	Top
CRMODLS_InventoryPeriod CRMOD_LS_Transactions ( Inventory Period Id )	CRMODLS_Inventory Period	Sample Transactions	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_InventoryPeriod CRMODLS_InventoryAuditReport ( Inventory Period Id )	CRMODLS_InventoryPeriod	Inventory Audit Reports	1-M
CRMODLS_InventoryPeriod CRMODLS_SampleInventory ( Inventory Period Id )	CRMODLS_InventoryPeriod	Sample Inventory	Child
CRMODLS_InventoryPeriod Custom Object 1 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 01	1-M-PRIMARY
CRMODLS_InventoryPeriod Custom Object 2 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 02	1-M-PRIMARY
CRMODLS_InventoryPeriod Custom Object 3 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 03	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject10 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 10	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject11 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 11	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject12 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 12	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject13 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 13	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject14 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 14	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject15 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 15	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject4 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 04	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject5 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 05	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject6 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 06	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject7 ( Invt Period Id )	CRMODLS_InventoryPeriod	Custom Objects 07	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_InventoryPeriod CustomObject8 ( Invt Period Id )	CRMODLS_Inventory Period	Custom Objects 08	1-M-PRIMARY
CRMODLS_InventoryPeriod CustomObject9 ( Invt Period Id )	CRMODLS_Inventory Period	Custom Objects 09	1-M-PRIMARY
CRMODLS_InventoryPeriod/Audit Trail Item 2	CRMODLS_Inventory Period	Audit Trail	ReadOnly
CRMODLS_InventoryPeriod/CRMODLS_InventoryPeriod Book	CRMODLS_Inventory Period	Books	Child
CRMODLS_ModificationLog	Not applicable	Modification Trackings	Top
CRMODLS_OBJECTIVE	Not applicable	Objective	Top
CRMODLS_OBJECTIVE Accreditation ( Objective Id )	CRMODLS_OBJECTIVE	Accreditations	1-M
CRMODLS_OBJECTIVE AccreditationRequest ( Objective Id )	CRMODLS_OBJECTIVE	Accreditation Requests	1-M-PRIMARY
CRMODLS_OBJECTIVE Activity ( Objective Id )	CRMODLS_OBJECTIVE	Activities	1-M-PRIMARY
CRMODLS_OBJECTIVE Certification ( Objective Id )	CRMODLS_OBJECTIVE	Certifications	1-M
CRMODLS_OBJECTIVE CertificationRequest ( Objective Id )	CRMODLS_OBJECTIVE	Certification Requests	1-M-PRIMARY
CRMODLS_OBJECTIVE Cmpltd Activity	CRMODLS_OBJECTIVE	Activities	1-M-PRIMARY
CRMODLS_OBJECTIVE Course ( Objective Id )	CRMODLS_OBJECTIVE	Courses	1-M
CRMODLS_OBJECTIVE CourseEnrollment ( Objective Id )	CRMODLS_OBJECTIVE	Course Enrollments	1-M-PRIMARY
CRMODLS_OBJECTIVE CRMOD_LS_MessagingPlan ( PrimaryObj Id )	CRMODLS_OBJECTIVE	Messaging Plans	1-M
CRMODLS_OBJECTIVE CRMODLS_OBJECTIVE ( Parent Objective Id )	CRMODLS_OBJECTIVE	Objectives	1-M-PRIMARY
CRMODLS_OBJECTIVE CRMODLS_OBJECTIVE_ATTACHMENT ( CRMODLS_OBJECTIVE Id )	CRMODLS_OBJECTIVE	Objective Attachments	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_OBJECTIVE Custom Object 1 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 01	1-M-PRIMARY
CRMODLS_OBJECTIVE Custom Object 2 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 02	1-M-PRIMARY
CRMODLS_OBJECTIVE Custom Object 3 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 03	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject10 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 10	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject11 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 11	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject12 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 12	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject13 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 13	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject14 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 14	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject15 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 15	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject4 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 04	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject5 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 05	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject6 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 06	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject7 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 07	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject8 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 08	1-M-PRIMARY
CRMODLS_OBJECTIVE CustomObject9 ( Objective Id )	CRMODLS_OBJECTIVE	Custom Objects 09	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_OBJECTIVE DealRegistration ( Objective Id )	CRMODLS_OBJECTIVE	Deal Registrations	1-M
CRMODLS_OBJECTIVE Exam ( Objective Id )	CRMODLS_OBJECTIVE	Exams	1-M
CRMODLS_OBJECTIVE ExamRegistration ( Objective Id )	CRMODLS_OBJECTIVE	Exam Registrations	1-M-PRIMARY
CRMODLS_OBJECTIVE Fund ( Objective Id )	CRMODLS_OBJECTIVE	Funds	1-M
CRMODLS_OBJECTIVE Lead ( Objective Id )	CRMODLS_OBJECTIVE	Leads	1-M-PRIMARY
CRMODLS_OBJECTIVE MDFRequest ( Objective Id )	CRMODLS_OBJECTIVE	MDF Requests	1-M
CRMODLS_OBJECTIVE MedEdEvent ( Objective Id )	CRMODLS_OBJECTIVE	Events	1-M
CRMODLS_OBJECTIVE Opportunity ( Objective Id )	CRMODLS_OBJECTIVE	Opportunities	1-M-PRIMARY
CRMODLS_OBJECTIVE Service Request ( Objective Id )	CRMODLS_OBJECTIVE	Service Requests	1-M-PRIMARY
CRMODLS_OBJECTIVE SmartCall ( Objective Id )	CRMODLS_OBJECTIVE	Smart Calls	1-M
CRMODLS_OBJECTIVE SPRequest ( Objective Id )	CRMODLS_OBJECTIVE	Special Pricing Requests	1-M
CRMODLS_OBJECTIVE/Audit Trail Item 2	CRMODLS_OBJECTIVE	Audit Trail	ReadOnly
CRMODLS_OBJECTIVE/CRMODLS_OBJECTIVE Book	CRMODLS_OBJECTIVE	Books	Child
CRMODLS_OBJECTIVE/CRMODLS_OBJECTIVETeam	CRMODLS_OBJECTIVE	Objective Teams	Child
CRMODLS_OBJECTIVE_ATTACHMENT	Not applicable	Objective Attachments	Top
CRMODLS_PCD_MSGRSP	Not applicable	Message Responses	Top
CRMODLS_PCD_MSGRSP CallProdDetail_MsgRsp ( Messaging Response Id )	CRMODLS_PCD_MSGRSP	Call Product Detail Message Responses	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_PCD_MSGRSP Custom Object 1 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 01	1-M-PRIMARY
CRMODLS_PCD_MSGRSP Custom Object 2 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 02	1-M-PRIMARY
CRMODLS_PCD_MSGRSP Custom Object 3 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 03	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject10 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 10	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject11 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 11	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject12 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 12	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject13 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 13	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject14 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 14	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject15 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 15	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject4 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 04	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject5 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 05	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject6 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 06	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject7 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 07	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject8 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 08	1-M-PRIMARY
CRMODLS_PCD_MSGRSP CustomObject9 ( Message Response Id )	CRMODLS_PCD_MSGRSP	Custom Objects 09	1-M-PRIMARY
CRMODLS_PlanOpportunities	Not applicable	Plan Opportunities	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_PlanOpportunities/Audit Trail Item 2	CRMODLS_Plan Opportunities	Audit Trail	ReadOnly
CRMODLS_RELDISC	Not applicable	Related Disclaimers	Top
CRMODLS_RELDISC CRMODLS_SIGNDISC ( Primary Disclaimer Id )	CRMODLS_RELDISC	Sample Disclaimers	1-M
CRMODLS_SampleInventory	Not applicable	Sample Inventory	Top
CRMODLS_SampleLot	Not applicable	Sample Lots	Top
CRMODLS_SampleLot Custom Object 1 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 01	1-M-PRIMARY
CRMODLS_SampleLot Custom Object 2 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 02	1-M-PRIMARY
CRMODLS_SampleLot Custom Object 3 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 03	1-M-PRIMARY
CRMODLS_SampleLot CustomObject10 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 10	1-M-PRIMARY
CRMODLS_SampleLot CustomObject11 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 11	1-M-PRIMARY
CRMODLS_SampleLot CustomObject12 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 12	1-M-PRIMARY
CRMODLS_SampleLot CustomObject13 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 13	1-M-PRIMARY
CRMODLS_SampleLot CustomObject14 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 14	1-M-PRIMARY
CRMODLS_SampleLot CustomObject15 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 15	1-M-PRIMARY
CRMODLS_SampleLot CustomObject4 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 04	1-M-PRIMARY
CRMODLS_SampleLot CustomObject5 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 05	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CRMODLS_SampleLot CustomObject6 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 06	1-M-PRIMARY
CRMODLS_SampleLot CustomObject7 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 07	1-M-PRIMARY
CRMODLS_SampleLot CustomObject8 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 08	1-M-PRIMARY
CRMODLS_SampleLot CustomObject9 ( Sample Lot Id )	CRMODLS_SampleLot	Custom Objects 09	1-M-PRIMARY
CRMODLS_SampleLot/Audit Trail Item 2	CRMODLS_SampleLot	Audit Trail	ReadOnly
CRMODLS_SampleLot/CRMODLS_SampleLot Book	CRMODLS_SampleLot	Books	Child
CRMODLS_Signature	Not applicable	Signature	Top
CRMODLS_Signature/Audit Trail Item 2	CRMODLS_Signature	Audit Trail	ReadOnly
CRMODLS_SIGNDISC	Not applicable	Sample Disclaimers	Top
CRMODLS_SIGNDISC CRMODLS_RELDISC ( Parent Id )	CRMODLS_SIGNDISC	Related Disclaimers	Child
CRMODLS_SIGNDISC/Audit Trail Item 2	CRMODLS_SIGNDISC	Audit Trail	ReadOnly
CustObj1	Not applicable	Custom Object 01	Top
CustObj1 Acct	CustObj1	Accounts	M-M
CustObj1 Asset	CustObj1	Assets	M-M
CustObj1 Att	CustObj1	Attachments	Child
CustObj1 Book	CustObj1	Books	Child
CustObj1 Camp	CustObj1	Campaigns	M-M
CustObj1 Cmpltd Activity	CustObj1	Completed Activities	M-M-PRIMARY
CustObj1 Contact	CustObj1	Contacts	M-M



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustObj1 CustObj1	CustObj1	Custom Objects 01	M-M-PRIMARY
CustObj1 CustObj2	CustObj1	Custom Objects 02	M-M-PRIMARY
CustObj1 CustObj3	CustObj1	Custom Objects 03	M-M-PRIMARY
CustObj1 Dealer	CustObj1	Dealers	M-M
CustObj1 Fund	CustObj1	Fund	M-M
CustObj1 Fund Request	CustObj1	Fund Requests	M-M
CustObj1 Household	CustObj1	Households	M-M
CustObj1 Lead	CustObj1	Leads	M-M-PRIMARY
CustObj1 MedEd	CustObj1	Event	M-M
CustObj1 Note	CustObj1	Notes	Child
CustObj1 Open Activity	CustObj1	Open Activities	M-M-PRIMARY
CustObj1 Opportunity	CustObj1	Opportunities	M-M-PRIMARY
CustObj1 Partner	CustObj1	Partner	M-M
CustObj1 Portfolio	CustObj1	Portfolios	M-M
CustObj1 Prod	CustObj1	Products	M-M
CustObj1 Service Request	CustObj1	Service Requests	M-M-PRIMARY
CustObj1 Solution	CustObj1	Solutions	M-M
CustObj1 Team	CustObj1	Custom Object 01 Team	Child
CustObj1 Vehicle	CustObj1	Vehicles	M-M
CustObj2	Not applicable	Custom Object 02	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustObj2 Acct	CustObj2	Accounts	M-M
CustObj2 Asset	CustObj2	Assets	M-M
CustObj2 Att	CustObj2	Attachments	Child
CustObj2 Book	CustObj2	Books	Child
CustObj2 Camp	CustObj2	Campaigns	M-M
CustObj2 Cmpltd Activity	CustObj2	Completed Activities	M-M-PRIMARY
CustObj2 Contact	CustObj2	Contacts	M-M
CustObj2 CustObj1	CustObj2	Custom Objects 01	M-M-PRIMARY
CustObj2 CustObj2	CustObj2	Custom Objects 02	M-M-PRIMARY
CustObj2 CustObj3	CustObj2	Custom Objects 03	M-M-PRIMARY
CustObj2 Dealer	CustObj2	Dealers	M-M
CustObj2 Fund	CustObj2	Fund	M-M
CustObj2 Fund Request	CustObj2	Fund Requests	M-M
CustObj2 Household	CustObj2	Households	M-M
CustObj2 Lead	CustObj2	Leads	M-M-PRIMARY
CustObj2 MedEd	CustObj2	Event	M-M
CustObj2 Note	CustObj2	Notes	Child
CustObj2 Open Activity	CustObj2	Open Activities	M-M-PRIMARY
CustObj2 Opportunity	CustObj2	Opportunities	M-M-PRIMARY
CustObj2 Partner	CustObj2	Partner	M-M
CustObj2 Portfolio	CustObj2	Portfolios	M-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustObj2 Prod	CustObj2	Products	M-M
CustObj2 Service Request	CustObj2	Service Requests	M-M-PRIMARY
CustObj2 Solution	CustObj2	Solutions	M-M
CustObj2 Team	CustObj2	Custom Object 02 Team	Child
CustObj2 Vehicle	CustObj2	Vehicles	M-M
CustObj3	Not applicable	Custom Object 03	Top
CustObj3 Acct	CustObj3	Accounts	M-M
CustObj3 Asset	CustObj3	Assets	M-M
CustObj3 Att	CustObj3	Attachments	Child
CustObj3 Book	CustObj3	Books	Child
CustObj3 Camp	CustObj3	Campaigns	M-M
CustObj3 Cmpltd Activity	CustObj3	Completed Activities	M-M-PRIMARY
CustObj3 Contact	CustObj3	Contacts	M-M
CustObj3 CustObj1	CustObj3	Custom Objects 01	M-M-PRIMARY
CustObj3 CustObj2	CustObj3	Custom Objects 02	M-M-PRIMARY
CustObj3 CustObj3	CustObj3	Custom Objects 03	M-M-PRIMARY
CustObj3 Dealer	CustObj3	Dealers	M-M
CustObj3 Fund	CustObj3	Fund	M-M
CustObj3 Fund Request	CustObj3	Fund Requests	M-M
CustObj3 Household	CustObj3	Households	M-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustObj3 Lead	CustObj3	Leads	M-M-PRIMARY
CustObj3 MedEd	CustObj3	Event	M-M
CustObj3 Note	CustObj3	Notes	Child
CustObj3 Open Activity	CustObj3	Open Activities	M-M-PRIMARY
CustObj3 Opportunity	CustObj3	Opportunities	M-M-PRIMARY
CustObj3 Partner	CustObj3	Partner	M-M
CustObj3 Portfolio	CustObj3	Portfolios	M-M
CustObj3 Prod	CustObj3	Products	M-M
CustObj3 Service Request	CustObj3	Service Requests	M-M-PRIMARY
CustObj3 Solution	CustObj3	Solutions	M-M
CustObj3 Team	CustObj3	Custom Object 03 Team	Child
CustObj3 Vehicle	CustObj3	Vehicles	M-M
Custom Object 1 Accreditation ( Custom Object 1 Id )	CustObj1	Accreditations	1-M
Custom Object 1 Certification ( Custom Object 1 Id )	CustObj1	Certifications	1-M
Custom Object 1 Course ( Custom Object 1 Id )	CustObj1	Courses	1-M
Custom Object 1 CRMODLS_Transactions ( Custom Object 1 Id )	CustObj1	Sample Transactions	1-M
Custom Object 1 CRMODLS_InventoryPeriod ( Custom Object 1 Id )	CustObj1	Inventory Periods	1-M
Custom Object 1 CRMODLS_SampleLot ( Custom Object 1 Id )	CustObj1	Sample Lots	1-M
Custom Object 1 CustomObject10 ( Custom Object 1 Id )	CustObj1	Custom Objects 10	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Custom Object 1 CustomObject11 ( Custom Object 1 Id )	CustObj1	Custom Objects 11	1-M-PRIMARY
Custom Object 1 CustomObject12 ( Custom Object 1 Id )	CustObj1	Custom Objects 12	1-M-PRIMARY
Custom Object 1 CustomObject13 ( Custom Object 1 Id )	CustObj1	Custom Objects 13	1-M-PRIMARY
Custom Object 1 CustomObject14 ( Custom Object 1 Id )	CustObj1	Custom Objects 14	1-M-PRIMARY
Custom Object 1 CustomObject15 ( Custom Object 1 Id )	CustObj1	Custom Objects 15	1-M-PRIMARY
Custom Object 1 CustomObject4 ( Custom Object 1 Id )	CustObj1	Custom Objects 04	1-M-PRIMARY
Custom Object 1 CustomObject5 ( Custom Object 1 Id )	CustObj1	Custom Objects 05	1-M-PRIMARY
Custom Object 1 CustomObject6 ( Custom Object 1 Id )	CustObj1	Custom Objects 06	1-M-PRIMARY
Custom Object 1 CustomObject7 ( Custom Object 1 Id )	CustObj1	Custom Objects 07	1-M-PRIMARY
Custom Object 1 CustomObject8 ( Custom Object 1 Id )	CustObj1	Custom Objects 08	1-M-PRIMARY
Custom Object 1 CustomObject9 ( Custom Object 1 Id )	CustObj1	Custom Objects 09	1-M-PRIMARY
Custom Object 1 DealRegistration ( Custom Object 1 Id )	CustObj1	Deal Registrations	1-M
Custom Object 1 Exam ( Custom Object 1 Id )	CustObj1	Exams	1-M
Custom Object 1 FinancialAccount ( Custom Object 1 Id )	CustObj1	Financial Accounts	1-M-PRIMARY
Custom Object 1 MDFRequest ( Custom Object 1 Id )	CustObj1	MDF Requests	1-M
Custom Object 1 Policy ( Custom Object 1 Id )	CustObj1	Policies	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Custom Object 1 SPRequest ( Custom Object 1 Id )	CustObj1	Special Pricing Requests	1-M
Custom Object 2 Accreditation ( Custom Object 2 Id )	CustObj2	Accreditations	1-M
Custom Object 2 Certification ( Custom Object 2 Id )	CustObj2	Certifications	1-M
Custom Object 2 Course ( Custom Object 2 Id )	CustObj2	Courses	1-M
Custom Object 2 CRMODLS_Transactions ( Custom Object 2 Id )	CustObj2	Sample Transactions	1-M
Custom Object 2 CRMODLS_InventoryPeriod ( Custom Object 2 Id )	CustObj2	Inventory Periods	1-M
Custom Object 2 CRMODLS_SampleLot ( Custom Object 2 Id )	CustObj2	Sample Lots	1-M
Custom Object 2 CustomObject10 ( Custom Object 2 Id )	CustObj2	Custom Objects 10	1-M-PRIMARY
Custom Object 2 CustomObject11 ( Custom Object 2 Id )	CustObj2	Custom Objects 11	1-M-PRIMARY
Custom Object 2 CustomObject12 ( Custom Object 2 Id )	CustObj2	Custom Objects 12	1-M-PRIMARY
Custom Object 2 CustomObject13 ( Custom Object 2 Id )	CustObj2	Custom Objects 13	1-M-PRIMARY
Custom Object 2 CustomObject14 ( Custom Object 2 Id )	CustObj2	Custom Objects 14	1-M-PRIMARY
Custom Object 2 CustomObject15 ( Custom Object 2 Id )	CustObj2	Custom Objects 15	1-M-PRIMARY
Custom Object 2 CustomObject4 ( Custom Object 2 Id )	CustObj2	Custom Objects 04	1-M-PRIMARY
Custom Object 2 CustomObject5 ( Custom Object 2 Id )	CustObj2	Custom Objects 05	1-M-PRIMARY
Custom Object 2 CustomObject6 ( Custom Object 2 Id )	CustObj2	Custom Objects 06	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Custom Object 2 CustomObject7 ( Custom Object 2 Id )	CustObj2	Custom Objects 07	1-M-PRIMARY
Custom Object 2 CustomObject8 ( Custom Object 2 Id )	CustObj2	Custom Objects 08	1-M-PRIMARY
Custom Object 2 CustomObject9 ( Custom Object 2 Id )	CustObj2	Custom Objects 09	1-M-PRIMARY
Custom Object 2 DealRegistration ( Custom Object 2 Id )	CustObj2	Deal Registrations	1-M
Custom Object 2 Exam ( Custom Object 2 Id )	CustObj2	Exams	1-M
Custom Object 2 FinancialAccount ( Custom Object 2 Id )	CustObj2	Financial Accounts	1-M-PRIMARY
Custom Object 2 MDFRequest ( Custom Object 2 Id )	CustObj2	MDF Requests	1-M
Custom Object 2 Policy ( Custom Object 2 Id )	CustObj2	Policies	1-M
Custom Object 2 SPRequest ( Custom Object 2 Id )	CustObj2	Special Pricing Requests	1-M
Custom Object 3 Accreditation ( Custom Object 3 Id )	CustObj3	Accreditations	1-M
Custom Object 3 Certification ( Custom Object 3 Id )	CustObj3	Certifications	1-M
Custom Object 3 Course ( Custom Object 3 Id )	CustObj3	Courses	1-M
Custom Object 3 CRMODLS_Transactions ( Custom Object 3 Id )	CustObj3	Sample Transactions	1-M
Custom Object 3 CRMODLS_InventoryPeriod ( Custom Object 3 Id )	CustObj3	Inventory Periods	1-M
Custom Object 3 CRMODLS_SampleLot ( Custom Object 3 Id )	CustObj3	Sample Lots	1-M
Custom Object 3 CustomObject10 ( Custom Object 3 Id )	CustObj3	Custom Objects 10	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Custom Object 3 CustomObject11 ( Custom Object 3 Id )	CustObj3	Custom Objects 11	1-M-PRIMARY
Custom Object 3 CustomObject12 ( Custom Object 3 Id )	CustObj3	Custom Objects 12	1-M-PRIMARY
Custom Object 3 CustomObject13 ( Custom Object 3 Id )	CustObj3	Custom Objects 13	1-M-PRIMARY
Custom Object 3 CustomObject14 ( Custom Object 3 Id )	CustObj3	Custom Objects 14	1-M-PRIMARY
Custom Object 3 CustomObject15 ( Custom Object 3 Id )	CustObj3	Custom Objects 15	1-M-PRIMARY
Custom Object 3 CustomObject4 ( Custom Object 3 Id )	CustObj3	Custom Objects 04	1-M-PRIMARY
Custom Object 3 CustomObject5 ( Custom Object 3 Id )	CustObj3	Custom Objects 05	1-M-PRIMARY
Custom Object 3 CustomObject6 ( Custom Object 3 Id )	CustObj3	Custom Objects 06	1-M-PRIMARY
Custom Object 3 CustomObject7 ( Custom Object 3 Id )	CustObj3	Custom Objects 07	1-M-PRIMARY
Custom Object 3 CustomObject8 ( Custom Object 3 Id )	CustObj3	Custom Objects 08	1-M-PRIMARY
Custom Object 3 CustomObject9 ( Custom Object 3 Id )	CustObj3	Custom Objects 09	1-M-PRIMARY
Custom Object 3 DealRegistration ( Custom Object 3 Id )	CustObj3	Deal Registrations	1-M
Custom Object 3 Exam ( Custom Object 3 Id )	CustObj3	Exams	1-M
Custom Object 3 FinancialAccount ( Custom Object 3 Id )	CustObj3	Financial Accounts	1-M-PRIMARY
Custom Object 3 MDFRequest ( Custom Object 3 Id )	CustObj3	MDF Requests	1-M
Custom Object 3 Policy ( Custom Object 3 Id )	CustObj3	Policies	1-M



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Custom Object 3 SPRequest ( Custom Object 3 Id )	CustObj3	Special Pricing Requests	1-M
CustomObject10	Not applicable	Custom Objects 10	Top
CustomObject10 Account ( CustomObject10 Id )	CustomObject10	Accounts	1-M
CustomObject10 Accreditation ( CustomObject10 Id )	CustomObject10	Accreditations	1-M
CustomObject10 Activity ( CustomObject10 Id )	CustomObject10	Activities	1-M-PRIMARY
CustomObject10 Asset ( CustomObject10 Id )	CustomObject10	Assets	1-M
CustomObject10 Campaign ( CustomObject10 Id )	CustomObject10	Campaigns	1-M
CustomObject10 Certification ( CustomObject10 Id )	CustomObject10	Certifications	1-M
CustomObject10 Channel Partner ( CustomObject10 Id )	CustomObject10	Dealers	1-M
CustomObject10 Cmpltd Activity	CustomObject10	Activities	1-M-PRIMARY
CustomObject10 Contact ( CustomObject10 Id )	CustomObject10	Contacts	1-M
CustomObject10 Course ( CustomObject10 Id )	CustomObject10	Courses	1-M
CustomObject10 CRMOD_LS_Transactions ( CustomObject10 Id )	CustomObject10	Sample Transactions	1-M
CustomObject10 CRMODLS_InventoryPeriod ( CustomObject10 Id )	CustomObject10	Inventory Periods	1-M
CustomObject10 CRMODLS_SampleLot ( CustomObject10 Id )	CustomObject10	Sample Lots	1-M
CustomObject10 Custom Object 1 ( CustomObject10 Id )	CustomObject10	Custom Objects 01	1-M-PRIMARY
CustomObject10 Custom Object 2 ( CustomObject10 Id )	CustomObject10	Custom Objects 02	1-M-PRIMARY
CustomObject10 Custom Object 3 ( CustomObject10 Id )	CustomObject10	Custom Objects 03	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject10 CustomObject10 ( CustomObject10 Id )	CustomObject10	Custom Objects 10	1-M-PRIMARY
CustomObject10 CustomObject11 ( CustomObject10 Id )	CustomObject10	Custom Objects 11	1-M-PRIMARY
CustomObject10 CustomObject12 ( CustomObject10 Id )	CustomObject10	Custom Objects 12	1-M-PRIMARY
CustomObject10 CustomObject13 ( CustomObject10 Id )	CustomObject10	Custom Objects 13	1-M-PRIMARY
CustomObject10 CustomObject14 ( CustomObject10 Id )	CustomObject10	Custom Objects 14	1-M-PRIMARY
CustomObject10 CustomObject15 ( CustomObject10 Id )	CustomObject10	Custom Objects 15	1-M-PRIMARY
CustomObject10 CustomObject4 ( CustomObject10 Id )	CustomObject10	Custom Objects 04	1-M-PRIMARY
CustomObject10 CustomObject5 ( CustomObject10 Id )	CustomObject10	Custom Objects 05	1-M-PRIMARY
CustomObject10 CustomObject6 ( CustomObject10 Id )	CustomObject10	Custom Objects 06	1-M-PRIMARY
CustomObject10 CustomObject7 ( CustomObject10 Id )	CustomObject10	Custom Objects 07	1-M-PRIMARY
CustomObject10 CustomObject8 ( CustomObject10 Id )	CustomObject10	Custom Objects 08	1-M-PRIMARY
CustomObject10 CustomObject9 ( CustomObject10 Id )	CustomObject10	Custom Objects 09	1-M-PRIMARY
CustomObject10 DealRegistration ( CustomObject10 Id )	CustomObject10	Deal Registrations	1-M
CustomObject10 Exam ( CustomObject10 Id )	CustomObject10	Exams	1-M
CustomObject10 FinancialAccount ( CustomObject10 Id )	CustomObject10	Financial Accounts	1-M-PRIMARY
CustomObject10 Fund ( CustomObject10 Id )	CustomObject10	Funds	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject10 Fund Request ( CustomObject10 Id )	CustomObject10	Fund Requests	1-M
CustomObject10 Household ( CustomObject10 Id )	CustomObject10	Households	1-M
CustomObject10 Lead ( CustomObject10 Id )	CustomObject10	Leads	1-M-PRIMARY
CustomObject10 MDFRequest ( CustomObject10 Id )	CustomObject10	MDF Requests	1-M
CustomObject10 MedEdEvent ( CustomObject10 Id )	CustomObject10	Events	1-M
CustomObject10 Opportunity ( CustomObject10 Id )	CustomObject10	Opportunities	1-M-PRIMARY
CustomObject10 Partner ( CustomObject10 Id )	CustomObject10	Partners	1-M
CustomObject10 Policy ( CustomObject10 Id )	CustomObject10	Policies	1-M
CustomObject10 Portfolio ( CustomObject10 Id )	CustomObject10	Portfolios	1-M
CustomObject10 Product ( CustomObject10 Id )	CustomObject10	Products	Child
CustomObject10 Program ( CustomObject10 Id )	CustomObject10	Partner Programs	1-M
CustomObject10 Revenue ( CustomObject10 Id )	CustomObject10	Revenues	Child
CustomObject10 Service Request ( CustomObject10 Id )	CustomObject10	Service Requests	1-M-PRIMARY
CustomObject10 SmartCall ( CustomObject10 Id )	CustomObject10	Smart Calls	1-M
CustomObject10 Solution ( CustomObject10 Id )	CustomObject10	Solutions	1-M
CustomObject10 SPRequest ( CustomObject10 Id )	CustomObject10	Special Pricing Requests	1-M
CustomObject10 Vehicle ( CustomObject10 Id )	CustomObject10	Vehicles	1-M
CustomObject10/Audit Trail Item 2	CustomObject10	Audit Trail	ReadOnly
CustomObject10/CustomObject10 Book	CustomObject10	Books	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject10/CustomObject10Team	CustomObject10	Custom Object 10 Teams	Child
CustomObject11	Not applicable	Custom Objects 11	Top
CustomObject11 Account ( CustomObject11 Id )	CustomObject11	Accounts	1-M
CustomObject11 Accreditation ( CustomObject11 Id )	CustomObject11	Accreditations	1-M
CustomObject11 Activity ( CustomObject11 Id )	CustomObject11	Activities	1-M-PRIMARY
CustomObject11 Asset ( CustomObject11 Id )	CustomObject11	Assets	1-M
CustomObject11 Campaign ( CustomObject11 Id )	CustomObject11	Campaigns	1-M
CustomObject11 Certification ( CustomObject11 Id )	CustomObject11	Certifications	1-M
CustomObject11 Channel Partner ( CustomObject11 Id )	CustomObject11	Dealers	1-M
CustomObject11 Cmpltd Activity	CustomObject11	Activities	1-M-PRIMARY
CustomObject11 Contact ( CustomObject11 Id )	CustomObject11	Contacts	1-M
CustomObject11 Course ( CustomObject11 Id )	CustomObject11	Courses	1-M
CustomObject11 CRMOD_LS_Transactions ( CustomObject11 Id )	CustomObject11	Sample Transactions	1-M
CustomObject11 CRMODLS_InventoryPeriod ( CustomObject11 Id )	CustomObject11	Inventory Periods	1-M
CustomObject11 CRMODLS_SampleLot ( CustomObject11 Id )	CustomObject11	Sample Lots	1-M
CustomObject11 Custom Object 1 ( CustomObject11 Id )	CustomObject11	Custom Objects 01	1-M-PRIMARY
CustomObject11 Custom Object 2 ( CustomObject11 Id )	CustomObject11	Custom Objects 02	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject11 Custom Object 3 ( CustomObject11 Id )	CustomObject11	Custom Objects 03	1-M-PRIMARY
CustomObject11 CustomObject10 ( CustomObject11 Id )	CustomObject11	Custom Objects 10	1-M-PRIMARY
CustomObject11 CustomObject11 ( CustomObject11 Id )	CustomObject11	Custom Objects 11	1-M-PRIMARY
CustomObject11 CustomObject12 ( CustomObject11 Id )	CustomObject11	Custom Objects 12	1-M-PRIMARY
CustomObject11 CustomObject13 ( CustomObject11 Id )	CustomObject11	Custom Objects 13	1-M-PRIMARY
CustomObject11 CustomObject14 ( CustomObject11 Id )	CustomObject11	Custom Objects 14	1-M-PRIMARY
CustomObject11 CustomObject15 ( CustomObject11 Id )	CustomObject11	Custom Objects 15	1-M-PRIMARY
CustomObject11 CustomObject4 ( CustomObject11 Id )	CustomObject11	Custom Objects 04	1-M-PRIMARY
CustomObject11 CustomObject5 ( CustomObject11 Id )	CustomObject11	Custom Objects 05	1-M-PRIMARY
CustomObject11 CustomObject6 ( CustomObject11 Id )	CustomObject11	Custom Objects 06	1-M-PRIMARY
CustomObject11 CustomObject7 ( CustomObject11 Id )	CustomObject11	Custom Objects 07	1-M-PRIMARY
CustomObject11 CustomObject8 ( CustomObject11 Id )	CustomObject11	Custom Objects 08	1-M-PRIMARY
CustomObject11 CustomObject9 ( CustomObject11 Id )	CustomObject11	Custom Objects 09	1-M-PRIMARY
CustomObject11 DealRegistration ( CustomObject11 Id )	CustomObject11	Deal Registrations	1-M
CustomObject11 Exam ( CustomObject11 Id )	CustomObject11	Exams	1-M
CustomObject11 FinancialAccount ( CustomObject11 Id )	CustomObject11	Financial Accounts	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject11 Fund ( CustomObject11 Id )	CustomObject11	Funds	1-M
CustomObject11 Fund Request ( CustomObject11 Id )	CustomObject11	Fund Requests	1-M
CustomObject11 Household ( CustomObject11 Id )	CustomObject11	Households	1-M
CustomObject11 Lead ( CustomObject11 Id )	CustomObject11	Leads	1-M-PRIMARY
CustomObject11 MDFRequest ( CustomObject11 Id )	CustomObject11	MDF Requests	1-M
CustomObject11 MedEdEvent ( CustomObject11 Id )	CustomObject11	Events	1-M
CustomObject11 Opportunity ( CustomObject11 Id )	CustomObject11	Opportunities	1-M-PRIMARY
CustomObject11 Partner ( CustomObject11 Id )	CustomObject11	Partners	1-M
CustomObject11 Policy ( CustomObject11 Id )	CustomObject11	Policies	1-M
CustomObject11 Portfolio ( CustomObject11 Id )	CustomObject11	Portfolios	1-M
CustomObject11 Product ( CustomObject11 Id )	CustomObject11	Products	Child
CustomObject11 Program ( CustomObject11 Id )	CustomObject11	Partner Programs	1-M
CustomObject11 Revenue ( CustomObject11 Id )	CustomObject11	Revenues	Child
CustomObject11 Service Request ( CustomObject11 Id )	CustomObject11	Service Requests	1-M-PRIMARY
CustomObject11 SmartCall ( CustomObject11 Id )	CustomObject11	Smart Calls	1-M
CustomObject11 Solution ( CustomObject11 Id )	CustomObject11	Solutions	1-M
CustomObject11 SPRequest ( CustomObject11 Id )	CustomObject11	Special Pricing Requests	1-M
CustomObject11 Vehicle ( CustomObject11 Id )	CustomObject11	Vehicles	1-M
CustomObject11/Audit Trail Item 2	CustomObject11	Audit Trail	ReadOnly

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject11/CustomObject11 Book	CustomObject11	Books	Child
CustomObject11/CustomObject11Team	CustomObject11	Custom Object 11 Teams	Child
CustomObject12	Not applicable	Custom Objects 12	Top
CustomObject12 Account ( CustomObject12 Id )	CustomObject12	Accounts	1-M
CustomObject12 Accreditation ( CustomObject12 Id )	CustomObject12	Accreditations	1-M
CustomObject12 Activity ( CustomObject12 Id )	CustomObject12	Activities	1-M-PRIMARY
CustomObject12 Asset ( CustomObject12 Id )	CustomObject12	Assets	1-M
CustomObject12 Campaign ( CustomObject12 Id )	CustomObject12	Campaigns	1-M
CustomObject12 Certification ( CustomObject12 Id )	CustomObject12	Certifications	1-M
CustomObject12 Channel Partner ( CustomObject12 Id )	CustomObject12	Dealers	1-M
CustomObject12 Cmpltd Activity	CustomObject12	Activities	1-M-PRIMARY
CustomObject12 Contact ( CustomObject12 Id )	CustomObject12	Contacts	1-M
CustomObject12 Course ( CustomObject12 Id )	CustomObject12	Courses	1-M
CustomObject12 CRMODLS_Transactions ( CustomObject12 Id )	CustomObject12	Sample Transactions	1-M
CustomObject12 CRMODLS_InventoryPeriod ( CustomObject12 Id )	CustomObject12	Inventory Periods	1-M
CustomObject12 CRMODLS_SampleLot ( CustomObject12 Id )	CustomObject12	Sample Lots	1-M
CustomObject12 Custom Object 1 ( CustomObject12 Id )	CustomObject12	Custom Objects 01	1-M-PRIMARY
CustomObject12 Custom Object 2 ( CustomObject12 Id )	CustomObject12	Custom Objects 02	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject12 Custom Object 3 ( CustomObject12 Id )	CustomObject12	Custom Objects 03	1-M-PRIMARY
CustomObject12 CustomObject10 ( CustomObject12 Id )	CustomObject12	Custom Objects 10	1-M-PRIMARY
CustomObject12 CustomObject11 ( CustomObject12 Id )	CustomObject12	Custom Objects 11	1-M-PRIMARY
CustomObject12 CustomObject12 ( CustomObject12 Id )	CustomObject12	Custom Objects 12	1-M-PRIMARY
CustomObject12 CustomObject13 ( CustomObject12 Id )	CustomObject12	Custom Objects 13	1-M-PRIMARY
CustomObject12 CustomObject14 ( CustomObject12 Id )	CustomObject12	Custom Objects 14	1-M-PRIMARY
CustomObject12 CustomObject15 ( CustomObject12 Id )	CustomObject12	Custom Objects 15	1-M-PRIMARY
CustomObject12 CustomObject4 ( CustomObject12 Id )	CustomObject12	Custom Objects 04	1-M-PRIMARY
CustomObject12 CustomObject5 ( CustomObject12 Id )	CustomObject12	Custom Objects 05	1-M-PRIMARY
CustomObject12 CustomObject6 ( CustomObject12 Id )	CustomObject12	Custom Objects 06	1-M-PRIMARY
CustomObject12 CustomObject7 ( CustomObject12 Id )	CustomObject12	Custom Objects 07	1-M-PRIMARY
CustomObject12 CustomObject8 ( CustomObject12 Id )	CustomObject12	Custom Objects 08	1-M-PRIMARY
CustomObject12 CustomObject9 ( CustomObject12 Id )	CustomObject12	Custom Objects 09	1-M-PRIMARY
CustomObject12 DealRegistration ( CustomObject12 Id )	CustomObject12	Deal Registrations	1-M
CustomObject12 Exam ( CustomObject12 Id )	CustomObject12	Exams	1-M



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject12 FinancialAccount ( CustomObject12 Id )	CustomObject12	Financial Accounts	1-M-PRIMARY
CustomObject12 Fund ( CustomObject12 Id )	CustomObject12	Funds	1-M
CustomObject12 Fund Request ( CustomObject12 Id )	CustomObject12	Fund Requests	1-M
CustomObject12 Household ( CustomObject12 Id )	CustomObject12	Households	1-M
CustomObject12 Lead ( CustomObject12 Id )	CustomObject12	Leads	1-M-PRIMARY
CustomObject12 MDFRequest ( CustomObject12 Id )	CustomObject12	MDF Requests	1-M
CustomObject12 MedEdEvent ( CustomObject12 Id )	CustomObject12	Events	1-M
CustomObject12 Opportunity ( CustomObject12 Id )	CustomObject12	Opportunities	1-M-PRIMARY
CustomObject12 Partner ( CustomObject12 Id )	CustomObject12	Partners	1-M
CustomObject12 Policy ( CustomObject12 Id )	CustomObject12	Policies	1-M
CustomObject12 Portfolio ( CustomObject12 Id )	CustomObject12	Portfolios	1-M
CustomObject12 Product ( CustomObject12 Id )	CustomObject12	Products	Child
CustomObject12 Program ( CustomObject12 Id )	CustomObject12	Partner Programs	1-M
CustomObject12 Revenue ( CustomObject12 Id )	CustomObject12	Revenues	Child
CustomObject12 Service Request ( CustomObject12 Id )	CustomObject12	Service Requests	1-M-PRIMARY
CustomObject12 SmartCall ( CustomObject12 Id )	CustomObject12	Smart Calls	1-M
CustomObject12 Solution ( CustomObject12 Id )	CustomObject12	Solutions	1-M
CustomObject12 SPRequest ( CustomObject12 Id )	CustomObject12	Special Pricing Requests	1-M
CustomObject12 Vehicle ( CustomObject12 Id )	CustomObject12	Vehicles	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject12/Audit Trail Item 2	CustomObject12	Audit Trail	ReadOnly
CustomObject12/CustomObject12 Book	CustomObject12	Books	Child
CustomObject12/CustomObject12Team	CustomObject12	Custom Object 12 Teams	Child
CustomObject13	Not applicable	Custom Objects 13	Top
CustomObject13 Account ( CustomObject13 Id )	CustomObject13	Accounts	1-M
CustomObject13 Accreditation ( CustomObject13 Id )	CustomObject13	Accreditations	1-M
CustomObject13 Activity ( CustomObject13 Id )	CustomObject13	Activities	1-M-PRIMARY
CustomObject13 Asset ( CustomObject13 Id )	CustomObject13	Assets	1-M
CustomObject13 Campaign ( CustomObject13 Id )	CustomObject13	Campaigns	1-M
CustomObject13 Certification ( CustomObject13 Id )	CustomObject13	Certifications	1-M
CustomObject13 Channel Partner ( CustomObject13 Id )	CustomObject13	Dealers	1-M
CustomObject13 Cmpltd Activity	CustomObject13	Activities	1-M-PRIMARY
CustomObject13 Contact ( CustomObject13 Id )	CustomObject13	Contacts	1-M
CustomObject13 Course ( CustomObject13 Id )	CustomObject13	Courses	1-M
CustomObject13 CRMODLS_Transactions ( CustomObject13 Id )	CustomObject13	Sample Transactions	1-M
CustomObject13 CRMODLS_InventoryPeriod ( CustomObject13 Id )	CustomObject13	Inventory Periods	1-M
CustomObject13 CRMODLS_SampleLot ( CustomObject13 Id )	CustomObject13	Sample Lots	1-M
CustomObject13 Custom Object 1 ( CustomObject13 Id )	CustomObject13	Custom Objects 01	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject13 Custom Object 2 ( CustomObject13 Id )	CustomObject13	Custom Objects 02	1-M-PRIMARY
CustomObject13 Custom Object 3 ( CustomObject13 Id )	CustomObject13	Custom Objects 03	1-M-PRIMARY
CustomObject13 CustomObject10 ( CustomObject13 Id )	CustomObject13	Custom Objects 10	1-M-PRIMARY
CustomObject13 CustomObject11 ( CustomObject13 Id )	CustomObject13	Custom Objects 11	1-M-PRIMARY
CustomObject13 CustomObject12 ( CustomObject13 Id )	CustomObject13	Custom Objects 12	1-M-PRIMARY
CustomObject13 CustomObject13 ( CustomObject13 Id )	CustomObject13	Custom Objects 13	1-M-PRIMARY
CustomObject13 CustomObject14 ( CustomObject13 Id )	CustomObject13	Custom Objects 14	1-M-PRIMARY
CustomObject13 CustomObject15 ( CustomObject13 Id )	CustomObject13	Custom Objects 15	1-M-PRIMARY
CustomObject13 CustomObject4 ( CustomObject13 Id )	CustomObject13	Custom Objects 04	1-M-PRIMARY
CustomObject13 CustomObject5 ( CustomObject13 Id )	CustomObject13	Custom Objects 05	1-M-PRIMARY
CustomObject13 CustomObject6 ( CustomObject13 Id )	CustomObject13	Custom Objects 06	1-M-PRIMARY
CustomObject13 CustomObject7 ( CustomObject13 Id )	CustomObject13	Custom Objects 07	1-M-PRIMARY
CustomObject13 CustomObject8 ( CustomObject13 Id )	CustomObject13	Custom Objects 08	1-M-PRIMARY
CustomObject13 CustomObject9 ( CustomObject13 Id )	CustomObject13	Custom Objects 09	1-M-PRIMARY
CustomObject13 DealRegistration ( CustomObject13 Id )	CustomObject13	Deal Registrations	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject13 Exam ( CustomObject13 Id )	CustomObject13	Exams	1-M
CustomObject13 FinancialAccount ( CustomObject13 Id )	CustomObject13	Financial Accounts	1-M-PRIMARY
CustomObject13 Fund ( CustomObject13 Id )	CustomObject13	Funds	1-M
CustomObject13 Fund Request ( CustomObject13 Id )	CustomObject13	Fund Requests	1-M
CustomObject13 Household ( CustomObject13 Id )	CustomObject13	Households	1-M
CustomObject13 Lead ( CustomObject13 Id )	CustomObject13	Leads	1-M-PRIMARY
CustomObject13 MDFRequest ( CustomObject13 Id )	CustomObject13	MDF Requests	1-M
CustomObject13 MedEdEvent ( CustomObject13 Id )	CustomObject13	Events	1-M
CustomObject13 Opportunity ( CustomObject13 Id )	CustomObject13	Opportunities	1-M-PRIMARY
CustomObject13 Partner ( CustomObject13 Id )	CustomObject13	Partners	1-M
CustomObject13 Policy ( CustomObject13 Id )	CustomObject13	Policies	1-M
CustomObject13 Portfolio ( CustomObject13 Id )	CustomObject13	Portfolios	1-M
CustomObject13 Product ( CustomObject13 Id )	CustomObject13	Products	Child
CustomObject13 Program ( CustomObject13 Id )	CustomObject13	Partner Programs	1-M
CustomObject13 Revenue ( CustomObject13 Id )	CustomObject13	Revenues	Child
CustomObject13 Service Request ( CustomObject13 Id )	CustomObject13	Service Requests	1-M-PRIMARY
CustomObject13 SmartCall ( CustomObject13 Id )	CustomObject13	Smart Calls	1-M
CustomObject13 Solution ( CustomObject13 Id )	CustomObject13	Solutions	1-M
CustomObject13 SPRequest ( CustomObject13 Id )	CustomObject13	Special Pricing Requests	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject13 Vehicle ( CustomObject13 Id )	CustomObject13	Vehicles	1-M
CustomObject13/Audit Trail Item 2	CustomObject13	Audit Trail	ReadOnly
CustomObject13/CustomObject13 Book	CustomObject13	Books	Child
CustomObject13/CustomObject13Team	CustomObject13	Custom Object 13 Teams	Child
CustomObject14	Not applicable	Custom Objects 14	Top
CustomObject14 Account ( CustomObject14 Id )	CustomObject14	Accounts	1-M
CustomObject14 Accreditation ( CustomObject14 Id )	CustomObject14	Accreditations	1-M
CustomObject14 Activity ( CustomObject14 Id )	CustomObject14	Activities	1-M-PRIMARY
CustomObject14 Asset ( CustomObject14 Id )	CustomObject14	Assets	1-M
CustomObject14 Campaign ( CustomObject14 Id )	CustomObject14	Campaigns	1-M
CustomObject14 Certification ( CustomObject14 Id )	CustomObject14	Certifications	1-M
CustomObject14 Channel Partner ( CustomObject14 Id )	CustomObject14	Dealers	1-M
CustomObject14 Cmpltd Activity	CustomObject14	Activities	1-M-PRIMARY
CustomObject14 Contact ( CustomObject14 Id )	CustomObject14	Contacts	1-M
CustomObject14 Course ( CustomObject14 Id )	CustomObject14	Courses	1-M
CustomObject14 CRMODLS_Transactions ( CustomObject14 Id )	CustomObject14	Sample Transactions	1-M
CustomObject14 CRMODLS_InventoryPeriod ( CustomObject14 Id )	CustomObject14	Inventory Periods	1-M
CustomObject14 CRMODLS_SampleLot ( CustomObject14 Id )	CustomObject14	Sample Lots	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject14 Custom Object 1 ( CustomObject14 Id )	CustomObject14	Custom Objects 01	1-M-PRIMARY
CustomObject14 Custom Object 2 ( CustomObject14 Id )	CustomObject14	Custom Objects 02	1-M-PRIMARY
CustomObject14 Custom Object 3 ( CustomObject14 Id )	CustomObject14	Custom Objects 03	1-M-PRIMARY
CustomObject14 CustomObject10 ( CustomObject14 Id )	CustomObject14	Custom Objects 10	1-M-PRIMARY
CustomObject14 CustomObject11 ( CustomObject14 Id )	CustomObject14	Custom Objects 11	1-M-PRIMARY
CustomObject14 CustomObject12 ( CustomObject14 Id )	CustomObject14	Custom Objects 12	1-M-PRIMARY
CustomObject14 CustomObject13 ( CustomObject14 Id )	CustomObject14	Custom Objects 13	1-M-PRIMARY
CustomObject14 CustomObject14 ( CustomObject14 Id )	CustomObject14	Custom Objects 14	1-M-PRIMARY
CustomObject14 CustomObject15 ( CustomObject14 Id )	CustomObject14	Custom Objects 15	1-M-PRIMARY
CustomObject14 CustomObject4 ( CustomObject14 Id )	CustomObject14	Custom Objects 04	1-M-PRIMARY
CustomObject14 CustomObject5 ( CustomObject14 Id )	CustomObject14	Custom Objects 05	1-M-PRIMARY
CustomObject14 CustomObject6 ( CustomObject14 Id )	CustomObject14	Custom Objects 06	1-M-PRIMARY
CustomObject14 CustomObject7 ( CustomObject14 Id )	CustomObject14	Custom Objects 07	1-M-PRIMARY
CustomObject14 CustomObject8 ( CustomObject14 Id )	CustomObject14	Custom Objects 08	1-M-PRIMARY
CustomObject14 CustomObject9 ( CustomObject14 Id )	CustomObject14	Custom Objects 09	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject14 DealRegistration ( CustomObject14 Id )	CustomObject14	Deal Registrations	1-M
CustomObject14 Exam ( CustomObject14 Id )	CustomObject14	Exams	1-M
CustomObject14 FinancialAccount ( CustomObject14 Id )	CustomObject14	Financial Accounts	1-M-PRIMARY
CustomObject14 Fund ( CustomObject14 Id )	CustomObject14	Funds	1-M
CustomObject14 Fund Request ( CustomObject14 Id )	CustomObject14	Fund Requests	1-M
CustomObject14 Household ( CustomObject14 Id )	CustomObject14	Households	1-M
CustomObject14 Lead ( CustomObject14 Id )	CustomObject14	Leads	1-M-PRIMARY
CustomObject14 MDFRequest ( CustomObject14 Id )	CustomObject14	MDF Requests	1-M
CustomObject14 MedEdEvent ( CustomObject14 Id )	CustomObject14	Events	1-M
CustomObject14 Opportunity ( CustomObject14 Id )	CustomObject14	Opportunities	1-M-PRIMARY
CustomObject14 Partner ( CustomObject14 Id )	CustomObject14	Partners	1-M
CustomObject14 Policy ( CustomObject14 Id )	CustomObject14	Policies	1-M
CustomObject14 Portfolio ( CustomObject14 Id )	CustomObject14	Portfolios	1-M
CustomObject14 Product ( CustomObject14 Id )	CustomObject14	Products	Child
CustomObject14 Program ( CustomObject14 Id )	CustomObject14	Partner Programs	1-M
CustomObject14 Revenue ( CustomObject14 Id )	CustomObject14	Revenues	Child
CustomObject14 Service Request ( CustomObject14 Id )	CustomObject14	Service Requests	1-M-PRIMARY
CustomObject14 SmartCall ( CustomObject14 Id )	CustomObject14	Smart Calls	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject14 Solution ( CustomObject14 Id )	CustomObject14	Solutions	1-M
CustomObject14 SPRequest ( CustomObject14 Id )	CustomObject14	Special Pricing Requests	1-M
CustomObject14 Vehicle ( CustomObject14 Id )	CustomObject14	Vehicles	1-M
CustomObject14/Audit Trail Item 2	CustomObject14	Audit Trail	ReadOnly
CustomObject14/CustomObject14 Book	CustomObject14	Books	Child
CustomObject14/CustomObject14Team	CustomObject14	Custom Object 14 Teams	Child
CustomObject15	Not applicable	Custom Objects 15	Top
CustomObject15 Account ( CustomObject15 Id )	CustomObject15	Accounts	1-M
CustomObject15 Accreditation ( CustomObject15 Id )	CustomObject15	Accreditations	1-M
CustomObject15 Activity ( CustomObject15 Id )	CustomObject15	Activities	1-M-PRIMARY
CustomObject15 Asset ( CustomObject15 Id )	CustomObject15	Assets	1-M
CustomObject15 Campaign ( CustomObject15 Id )	CustomObject15	Campaigns	1-M
CustomObject15 Certification ( CustomObject15 Id )	CustomObject15	Certifications	1-M
CustomObject15 Channel Partner ( CustomObject15 Id )	CustomObject15	Dealers	1-M
CustomObject15 Cmpltd Activity	CustomObject15	Activities	1-M-PRIMARY
CustomObject15 Contact ( CustomObject15 Id )	CustomObject15	Contacts	1-M
CustomObject15 Course ( CustomObject15 Id )	CustomObject15	Courses	1-M
CustomObject15 CRMOD_LS_Transactions ( CustomObject15 Id )	CustomObject15	Sample Transactions	1-M
CustomObject15 CRMODLS_InventoryPeriod ( CustomObject15 Id )	CustomObject15	Inventory Periods	1-M



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject15 CRMODLS_SampleLot ( CustomObject15 Id )	CustomObject15	Sample Lots	1-M
CustomObject15 Custom Object 1 ( CustomObject15 Id )	CustomObject15	Custom Objects 01	1-M-PRIMARY
CustomObject15 Custom Object 2 ( CustomObject15 Id )	CustomObject15	Custom Objects 02	1-M-PRIMARY
CustomObject15 Custom Object 3 ( CustomObject15 Id )	CustomObject15	Custom Objects 03	1-M-PRIMARY
CustomObject15 CustomObject10 ( CustomObject15 Id )	CustomObject15	Custom Objects 10	1-M-PRIMARY
CustomObject15 CustomObject11 ( CustomObject15 Id )	CustomObject15	Custom Objects 11	1-M-PRIMARY
CustomObject15 CustomObject12 ( CustomObject15 Id )	CustomObject15	Custom Objects 12	1-M-PRIMARY
CustomObject15 CustomObject13 ( CustomObject15 Id )	CustomObject15	Custom Objects 13	1-M-PRIMARY
CustomObject15 CustomObject14 ( CustomObject15 Id )	CustomObject15	Custom Objects 14	1-M-PRIMARY
CustomObject15 CustomObject15 ( CustomObject15 Id )	CustomObject15	Custom Objects 15	1-M-PRIMARY
CustomObject15 CustomObject4 ( CustomObject15 Id )	CustomObject15	Custom Objects 04	1-M-PRIMARY
CustomObject15 CustomObject5 ( CustomObject15 Id )	CustomObject15	Custom Objects 05	1-M-PRIMARY
CustomObject15 CustomObject6 ( CustomObject15 Id )	CustomObject15	Custom Objects 06	1-M-PRIMARY
CustomObject15 CustomObject7 ( CustomObject15 Id )	CustomObject15	Custom Objects 07	1-M-PRIMARY
CustomObject15 CustomObject8 ( CustomObject15 Id )	CustomObject15	Custom Objects 08	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject15 CustomObject9 ( CustomObject15 Id )	CustomObject15	Custom Objects 09	1-M-PRIMARY
CustomObject15 DealRegistration ( CustomObject15 Id )	CustomObject15	Deal Registrations	1-M
CustomObject15 Exam ( CustomObject15 Id )	CustomObject15	Exams	1-M
CustomObject15 FinancialAccount ( CustomObject15 Id )	CustomObject15	Financial Accounts	1-M-PRIMARY
CustomObject15 Fund ( CustomObject15 Id )	CustomObject15	Funds	1-M
CustomObject15 Fund Request ( CustomObject15 Id )	CustomObject15	Fund Requests	1-M
CustomObject15 Household ( CustomObject15 Id )	CustomObject15	Households	1-M
CustomObject15 Lead ( CustomObject15 Id )	CustomObject15	Leads	1-M-PRIMARY
CustomObject15 MDFRequest ( CustomObject15 Id )	CustomObject15	MDF Requests	1-M
CustomObject15 MedEdEvent ( CustomObject15 Id )	CustomObject15	Events	1-M
CustomObject15 Opportunity ( CustomObject15 Id )	CustomObject15	Opportunities	1-M-PRIMARY
CustomObject15 Partner ( CustomObject15 Id )	CustomObject15	Partners	1-M
CustomObject15 Policy ( CustomObject15 Id )	CustomObject15	Policies	1-M
CustomObject15 Portfolio ( CustomObject15 Id )	CustomObject15	Portfolios	1-M
CustomObject15 Product ( CustomObject15 Id )	CustomObject15	Products	Child
CustomObject15 Program ( CustomObject15 Id )	CustomObject15	Partner Programs	1-M
CustomObject15 Revenue ( CustomObject15 Id )	CustomObject15	Revenues	Child
CustomObject15 Service Request ( CustomObject15 Id )	CustomObject15	Service Requests	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject15 SmartCall ( CustomObject15 Id )	CustomObject15	Smart Calls	1-M
CustomObject15 Solution ( CustomObject15 Id )	CustomObject15	Solutions	1-M
CustomObject15 SPRequest ( CustomObject15 Id )	CustomObject15	Special Pricing Requests	1-M
CustomObject15 Vehicle ( CustomObject15 Id )	CustomObject15	Vehicles	1-M
CustomObject15/Audit Trail Item 2	CustomObject15	Audit Trail	ReadOnly
CustomObject15/CustomObject15 Book	CustomObject15	Books	Child
CustomObject15/CustomObject15Team	CustomObject15	Custom Object 15 Teams	Child
CustomObject4	Not applicable	Custom Objects 04	Top
CustomObject4 Account ( CustomObject4 Id )	CustomObject4	Accounts	1-M
CustomObject4 Accreditation ( CustomObject4 Id )	CustomObject4	Accreditations	1-M
CustomObject4 Activity ( CustomObject4 Id )	CustomObject4	Activities	1-M-PRIMARY
CustomObject4 Asset ( CustomObject4 Id )	CustomObject4	Assets	1-M
CustomObject4 Campaign ( CustomObject4 Id )	CustomObject4	Campaigns	1-M
CustomObject4 Certification ( CustomObject4 Id )	CustomObject4	Certifications	1-M
CustomObject4 Channel Partner ( CustomObject4 Id )	CustomObject4	Dealers	1-M
CustomObject4 Cmpltd Activity	CustomObject4	Activities	1-M-PRIMARY
CustomObject4 Contact ( CustomObject4 Id )	CustomObject4	Contacts	1-M
CustomObject4 Course ( CustomObject4 Id )	CustomObject4	Courses	1-M
CustomObject4 CRMOD_LS_Transactions ( CustomObject4 Id )	CustomObject4	Sample Transactions	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject4 CRMODLS_InventoryPeriod ( CustomObject4 Id )	CustomObject4	Inventory Periods	1-M
CustomObject4 CRMODLS_SampleLot ( CustomObject4 Id )	CustomObject4	Sample Lots	1-M
CustomObject4 Custom Object 1 ( CustomObject4 Id )	CustomObject4	Custom Objects 01	1-M-PRIMARY
CustomObject4 Custom Object 2 ( CustomObject4 Id )	CustomObject4	Custom Objects 02	1-M-PRIMARY
CustomObject4 Custom Object 3 ( CustomObject4 Id )	CustomObject4	Custom Objects 03	1-M-PRIMARY
CustomObject4 CustomObject10 ( CustomObject4 Id )	CustomObject4	Custom Objects 10	1-M-PRIMARY
CustomObject4 CustomObject11 ( CustomObject4 Id )	CustomObject4	Custom Objects 11	1-M-PRIMARY
CustomObject4 CustomObject12 ( CustomObject4 Id )	CustomObject4	Custom Objects 12	1-M-PRIMARY
CustomObject4 CustomObject13 ( CustomObject4 Id )	CustomObject4	Custom Objects 13	1-M-PRIMARY
CustomObject4 CustomObject14 ( CustomObject4 Id )	CustomObject4	Custom Objects 14	1-M-PRIMARY
CustomObject4 CustomObject15 ( CustomObject4 Id )	CustomObject4	Custom Objects 15	1-M-PRIMARY
CustomObject4 CustomObject4 ( CustomObject4 Id )	CustomObject4	Custom Objects 04	1-M-PRIMARY
CustomObject4 CustomObject5 ( CustomObject4 Id )	CustomObject4	Custom Objects 05	1-M-PRIMARY
CustomObject4 CustomObject6 ( CustomObject4 Id )	CustomObject4	Custom Objects 06	1-M-PRIMARY
CustomObject4 CustomObject7 ( CustomObject4 Id )	CustomObject4	Custom Objects 07	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject4 CustomObject8 ( CustomObject4 Id )	CustomObject4	Custom Objects 08	1-M-PRIMARY
CustomObject4 CustomObject9 ( CustomObject4 Id )	CustomObject4	Custom Objects 09	1-M-PRIMARY
CustomObject4 DealRegistration ( CustomObject4 Id )	CustomObject4	Deal Registrations	1-M
CustomObject4 Exam ( CustomObject4 Id )	CustomObject4	Exams	1-M
CustomObject4 FinancialAccount ( CustomObject4 Id )	CustomObject4	Financial Accounts	1-M-PRIMARY
CustomObject4 Fund ( CustomObject4 Id )	CustomObject4	Funds	1-M
CustomObject4 Fund Request ( CustomObject4 Id )	CustomObject4	Fund Requests	1-M
CustomObject4 Household ( CustomObject4 Id )	CustomObject4	Households	1-M
CustomObject4 Lead ( CustomObject4 Id )	CustomObject4	Leads	1-M-PRIMARY
CustomObject4 MDFRequest ( CustomObject4 Id )	CustomObject4	MDF Requests	1-M
CustomObject4 MedEdEvent ( CustomObject4 Id )	CustomObject4	Events	1-M
CustomObject4 Opportunity ( CustomObject4 Id )	CustomObject4	Opportunities	1-M-PRIMARY
CustomObject4 Partner ( CustomObject4 Id )	CustomObject4	Partners	1-M
CustomObject4 Policy ( CustomObject4 Id )	CustomObject4	Policies	1-M
CustomObject4 Portfolio ( CustomObject4 Id )	CustomObject4	Portfolios	1-M
CustomObject4 Product ( CustomObject4 Id )	CustomObject4	Products	Child
CustomObject4 Program ( CustomObject4 Id )	CustomObject4	Partner Programs	1-M
CustomObject4 Revenue ( CustomObject4 Id )	CustomObject4	Revenues	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject4 Service Request ( CustomObject4 Id )	CustomObject4	Service Requests	1-M-PRIMARY
CustomObject4 SmartCall ( CustomObject4 Id )	CustomObject4	Smart Calls	1-M
CustomObject4 Solution ( CustomObject4 Id )	CustomObject4	Solutions	1-M
CustomObject4 SPRequest ( CustomObject4 Id )	CustomObject4	Special Pricing Requests	1-M
CustomObject4 Vehicle ( CustomObject4 Id )	CustomObject4	Vehicles	1-M
CustomObject4/Audit Trail Item 2	CustomObject4	Audit Trail	ReadOnly
CustomObject4/CustomObject4 Book	CustomObject4	Books	Child
CustomObject4/CustomObject4Team	CustomObject4	Custom Object 04 Teams	Child
CustomObject5	Not applicable	Custom Objects 05	Top
CustomObject5 Account ( CustomObject5 Id )	CustomObject5	Accounts	1-M
CustomObject5 Accreditation ( CustomObject5 Id )	CustomObject5	Accreditations	1-M
CustomObject5 Activity ( CustomObject5 Id )	CustomObject5	Activities	1-M-PRIMARY
CustomObject5 Asset ( CustomObject5 Id )	CustomObject5	Assets	1-M
CustomObject5 Campaign ( CustomObject5 Id )	CustomObject5	Campaigns	1-M
CustomObject5 Certification ( CustomObject5 Id )	CustomObject5	Certifications	1-M
CustomObject5 Channel Partner ( CustomObject5 Id )	CustomObject5	Dealers	1-M
CustomObject5 Cmpltd Activity	CustomObject5	Activities	1-M-PRIMARY
CustomObject5 Contact ( CustomObject5 Id )	CustomObject5	Contacts	1-M
CustomObject5 Course ( CustomObject5 Id )	CustomObject5	Courses	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject5 CRMOD_LS_Transactions ( CustomObject5 Id )	CustomObject5	Sample Transactions	1-M
CustomObject5 CRMODLS_InventoryPeriod ( CustomObject5 Id )	CustomObject5	Inventory Periods	1-M
CustomObject5 CRMODLS_SampleLot ( CustomObject5 Id )	CustomObject5	Sample Lots	1-M
CustomObject5 Custom Object 1 ( CustomObject5 Id )	CustomObject5	Custom Objects 01	1-M-PRIMARY
CustomObject5 Custom Object 2 ( CustomObject5 Id )	CustomObject5	Custom Objects 02	1-M-PRIMARY
CustomObject5 Custom Object 3 ( CustomObject5 Id )	CustomObject5	Custom Objects 03	1-M-PRIMARY
CustomObject5 CustomObject10 ( CustomObject5 Id )	CustomObject5	Custom Objects 10	1-M-PRIMARY
CustomObject5 CustomObject11 ( CustomObject5 Id )	CustomObject5	Custom Objects 11	1-M-PRIMARY
CustomObject5 CustomObject12 ( CustomObject5 Id )	CustomObject5	Custom Objects 12	1-M-PRIMARY
CustomObject5 CustomObject13 ( CustomObject5 Id )	CustomObject5	Custom Objects 13	1-M-PRIMARY
CustomObject5 CustomObject14 ( CustomObject5 Id )	CustomObject5	Custom Objects 14	1-M-PRIMARY
CustomObject5 CustomObject15 ( CustomObject5 Id )	CustomObject5	Custom Objects 15	1-M-PRIMARY
CustomObject5 CustomObject4 ( CustomObject5 Id )	CustomObject5	Custom Objects 04	1-M-PRIMARY
CustomObject5 CustomObject5 ( CustomObject5 Id )	CustomObject5	Custom Objects 05	1-M-PRIMARY
CustomObject5 CustomObject6 ( CustomObject5 Id )	CustomObject5	Custom Objects 06	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject5 CustomObject7 ( CustomObject5 Id )	CustomObject5	Custom Objects 07	1-M-PRIMARY
CustomObject5 CustomObject8 ( CustomObject5 Id )	CustomObject5	Custom Objects 08	1-M-PRIMARY
CustomObject5 CustomObject9 ( CustomObject5 Id )	CustomObject5	Custom Objects 09	1-M-PRIMARY
CustomObject5 DealRegistration ( CustomObject5 Id )	CustomObject5	Deal Registrations	1-M
CustomObject5 Exam ( CustomObject5 Id )	CustomObject5	Exams	1-M
CustomObject5 FinancialAccount ( CustomObject5 Id )	CustomObject5	Financial Accounts	1-M-PRIMARY
CustomObject5 Fund ( CustomObject5 Id )	CustomObject5	Funds	1-M
CustomObject5 Fund Request ( CustomObject5 Id )	CustomObject5	Fund Requests	1-M
CustomObject5 Household ( CustomObject5 Id )	CustomObject5	Households	1-M
CustomObject5 Lead ( CustomObject5 Id )	CustomObject5	Leads	1-M-PRIMARY
CustomObject5 MDFRequest ( CustomObject5 Id )	CustomObject5	MDF Requests	1-M
CustomObject5 MedEdEvent ( CustomObject5 Id )	CustomObject5	Events	1-M
CustomObject5 Opportunity ( CustomObject5 Id )	CustomObject5	Opportunities	1-M-PRIMARY
CustomObject5 Partner ( CustomObject5 Id )	CustomObject5	Partners	1-M
CustomObject5 Policy ( CustomObject5 Id )	CustomObject5	Policies	1-M
CustomObject5 Portfolio ( CustomObject5 Id )	CustomObject5	Portfolios	1-M
CustomObject5 Product ( CustomObject5 Id )	CustomObject5	Products	Child
CustomObject5 Program ( CustomObject5 Id )	CustomObject5	Partner Programs	1-M
CustomObject5 Revenue ( CustomObject5 Id )	CustomObject5	Revenues	Child



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject5 Service Request ( CustomObject5 Id )	CustomObject5	Service Requests	1-M-PRIMARY
CustomObject5 SmartCall ( CustomObject5 Id )	CustomObject5	Smart Calls	1-M
CustomObject5 Solution ( CustomObject5 Id )	CustomObject5	Solutions	1-M
CustomObject5 SPRequest ( CustomObject5 Id )	CustomObject5	Special Pricing Requests	1-M
CustomObject5 Vehicle ( CustomObject5 Id )	CustomObject5	Vehicles	1-M
CustomObject5/Audit Trail Item 2	CustomObject5	Audit Trail	ReadOnly
CustomObject5/CustomObject5 Book	CustomObject5	Books	Child
CustomObject5/CustomObject5Team	CustomObject5	Custom Object 05 Teams	Child
CustomObject6	Not applicable	Custom Objects 06	Top
CustomObject6 Account ( CustomObject6 Id )	CustomObject6	Accounts	1-M
CustomObject6 Accreditation ( CustomObject6 Id )	CustomObject6	Accreditations	1-M
CustomObject6 Activity ( CustomObject6 Id )	CustomObject6	Activities	1-M-PRIMARY
CustomObject6 Asset ( CustomObject6 Id )	CustomObject6	Assets	1-M
CustomObject6 Campaign ( CustomObject6 Id )	CustomObject6	Campaigns	1-M
CustomObject6 Certification ( CustomObject6 Id )	CustomObject6	Certifications	1-M
CustomObject6 Channel Partner ( CustomObject6 Id )	CustomObject6	Dealers	1-M
CustomObject6 Cmpltd Activity	CustomObject6	Activities	1-M-PRIMARY
CustomObject6 Contact ( CustomObject6 Id )	CustomObject6	Contacts	1-M
CustomObject6 Course ( CustomObject6 Id )	CustomObject6	Courses	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject6 CRMOD_LS_Transactions ( CustomObject6 Id )	CustomObject6	Sample Transactions	1-M
CustomObject6 CRMODLS_InventoryPeriod ( CustomObject6 Id )	CustomObject6	Inventory Periods	1-M
CustomObject6 CRMODLS_SampleLot ( CustomObject6 Id )	CustomObject6	Sample Lots	1-M
CustomObject6 Custom Object 1 ( CustomObject6 Id )	CustomObject6	Custom Objects 01	1-M-PRIMARY
CustomObject6 Custom Object 2 ( CustomObject6 Id )	CustomObject6	Custom Objects 02	1-M-PRIMARY
CustomObject6 Custom Object 3 ( CustomObject6 Id )	CustomObject6	Custom Objects 03	1-M-PRIMARY
CustomObject6 CustomObject10 ( CustomObject6 Id )	CustomObject6	Custom Objects 10	1-M-PRIMARY
CustomObject6 CustomObject11 ( CustomObject6 Id )	CustomObject6	Custom Objects 11	1-M-PRIMARY
CustomObject6 CustomObject12 ( CustomObject6 Id )	CustomObject6	Custom Objects 12	1-M-PRIMARY
CustomObject6 CustomObject13 ( CustomObject6 Id )	CustomObject6	Custom Objects 13	1-M-PRIMARY
CustomObject6 CustomObject14 ( CustomObject6 Id )	CustomObject6	Custom Objects 14	1-M-PRIMARY
CustomObject6 CustomObject15 ( CustomObject6 Id )	CustomObject6	Custom Objects 15	1-M-PRIMARY
CustomObject6 CustomObject4 ( CustomObject6 Id )	CustomObject6	Custom Objects 04	1-M-PRIMARY
CustomObject6 CustomObject5 ( CustomObject6 Id )	CustomObject6	Custom Objects 05	1-M-PRIMARY
CustomObject6 CustomObject6 ( CustomObject6 Id )	CustomObject6	Custom Objects 06	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject6 CustomObject7 ( CustomObject6 Id )	CustomObject6	Custom Objects 07	1-M-PRIMARY
CustomObject6 CustomObject8 ( CustomObject6 Id )	CustomObject6	Custom Objects 08	1-M-PRIMARY
CustomObject6 CustomObject9 ( CustomObject6 Id )	CustomObject6	Custom Objects 09	1-M-PRIMARY
CustomObject6 DealRegistration ( CustomObject6 Id )	CustomObject6	Deal Registrations	1-M
CustomObject6 Exam ( CustomObject6 Id )	CustomObject6	Exams	1-M
CustomObject6 FinancialAccount ( CustomObject6 Id )	CustomObject6	Financial Accounts	1-M-PRIMARY
CustomObject6 Fund ( CustomObject6 Id )	CustomObject6	Funds	1-M
CustomObject6 Fund Request ( CustomObject6 Id )	CustomObject6	Fund Requests	1-M
CustomObject6 Household ( CustomObject6 Id )	CustomObject6	Households	1-M
CustomObject6 Lead ( CustomObject6 Id )	CustomObject6	Leads	1-M-PRIMARY
CustomObject6 MDFRequest ( CustomObject6 Id )	CustomObject6	MDF Requests	1-M
CustomObject6 MedEdEvent ( CustomObject6 Id )	CustomObject6	Events	1-M
CustomObject6 Opportunity ( CustomObject6 Id )	CustomObject6	Opportunities	1-M-PRIMARY
CustomObject6 Partner ( CustomObject6 Id )	CustomObject6	Partners	1-M
CustomObject6 Policy ( CustomObject6 Id )	CustomObject6	Policies	1-M
CustomObject6 Portfolio ( CustomObject6 Id )	CustomObject6	Portfolios	1-M
CustomObject6 Product ( CustomObject6 Id )	CustomObject6	Products	Child
CustomObject6 Program ( CustomObject6 Id )	CustomObject6	Partner Programs	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject6 Revenue ( CustomObject6 Id )	CustomObject6	Revenues	Child
CustomObject6 Service Request ( CustomObject6 Id )	CustomObject6	Service Requests	1-M-PRIMARY
CustomObject6 SmartCall ( CustomObject6 Id )	CustomObject6	Smart Calls	1-M
CustomObject6 Solution ( CustomObject6 Id )	CustomObject6	Solutions	1-M
CustomObject6 SPRequest ( CustomObject6 Id )	CustomObject6	Special Pricing Requests	1-M
CustomObject6 Vehicle ( CustomObject6 Id )	CustomObject6	Vehicles	1-M
CustomObject6/Audit Trail Item 2	CustomObject6	Audit Trail	ReadOnly
CustomObject6/CustomObject6 Book	CustomObject6	Books	Child
CustomObject6/CustomObject6Team	CustomObject6	Custom Object 06 Teams	Child
CustomObject7	Not applicable	Custom Objects 07	Top
CustomObject7 Account ( CustomObject7 Id )	CustomObject7	Accounts	1-M
CustomObject7 Accreditation ( CustomObject7 Id )	CustomObject7	Accreditations	1-M
CustomObject7 Activity ( CustomObject7 Id )	CustomObject7	Activities	1-M-PRIMARY
CustomObject7 Asset ( CustomObject7 Id )	CustomObject7	Assets	1-M
CustomObject7 Campaign ( CustomObject7 Id )	CustomObject7	Campaigns	1-M
CustomObject7 Certification ( CustomObject7 Id )	CustomObject7	Certifications	1-M
CustomObject7 Channel Partner ( CustomObject7 Id )	CustomObject7	Dealers	1-M
CustomObject7 Cmpltd Activity	CustomObject7	Activities	1-M-PRIMARY
CustomObject7 Contact ( CustomObject7 Id )	CustomObject7	Contacts	1-M
CustomObject7 Course ( CustomObject7 Id )	CustomObject7	Courses	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject7 CRMOD_LS_Transactions ( CustomObject7 Id )	CustomObject7	Sample Transactions	1-M
CustomObject7 CRMODLS_InventoryPeriod ( CustomObject7 Id )	CustomObject7	Inventory Periods	1-M
CustomObject7 CRMODLS_SampleLot ( CustomObject7 Id )	CustomObject7	Sample Lots	1-M
CustomObject7 Custom Object 1 ( CustomObject7 Id )	CustomObject7	Custom Objects 01	1-M-PRIMARY
CustomObject7 Custom Object 2 ( CustomObject7 Id )	CustomObject7	Custom Objects 02	1-M-PRIMARY
CustomObject7 Custom Object 3 ( CustomObject7 Id )	CustomObject7	Custom Objects 03	1-M-PRIMARY
CustomObject7 CustomObject10 ( CustomObject7 Id )	CustomObject7	Custom Objects 10	1-M-PRIMARY
CustomObject7 CustomObject11 ( CustomObject7 Id )	CustomObject7	Custom Objects 11	1-M-PRIMARY
CustomObject7 CustomObject12 ( CustomObject7 Id )	CustomObject7	Custom Objects 12	1-M-PRIMARY
CustomObject7 CustomObject13 ( CustomObject7 Id )	CustomObject7	Custom Objects 13	1-M-PRIMARY
CustomObject7 CustomObject14 ( CustomObject7 Id )	CustomObject7	Custom Objects 14	1-M-PRIMARY
CustomObject7 CustomObject15 ( CustomObject7 Id )	CustomObject7	Custom Objects 15	1-M-PRIMARY
CustomObject7 CustomObject4 ( CustomObject7 Id )	CustomObject7	Custom Objects 04	1-M-PRIMARY
CustomObject7 CustomObject5 ( CustomObject7 Id )	CustomObject7	Custom Objects 05	1-M-PRIMARY
CustomObject7 CustomObject6 ( CustomObject7 Id )	CustomObject7	Custom Objects 06	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject7 CustomObject7 ( CustomObject7 Id )	CustomObject7	Custom Objects 07	1-M-PRIMARY
CustomObject7 CustomObject8 ( CustomObject7 Id )	CustomObject7	Custom Objects 08	1-M-PRIMARY
CustomObject7 CustomObject9 ( CustomObject7 Id )	CustomObject7	Custom Objects 09	1-M-PRIMARY
CustomObject7 DealRegistration ( CustomObject7 Id )	CustomObject7	Deal Registrations	1-M
CustomObject7 Exam ( CustomObject7 Id )	CustomObject7	Exams	1-M
CustomObject7 FinancialAccount ( CustomObject7 Id )	CustomObject7	Financial Accounts	1-M-PRIMARY
CustomObject7 Fund ( CustomObject7 Id )	CustomObject7	Funds	1-M
CustomObject7 Fund Request ( CustomObject7 Id )	CustomObject7	Fund Requests	1-M
CustomObject7 Household ( CustomObject7 Id )	CustomObject7	Households	1-M
CustomObject7 Lead ( CustomObject7 Id )	CustomObject7	Leads	1-M-PRIMARY
CustomObject7 MDFRequest ( CustomObject7 Id )	CustomObject7	MDF Requests	1-M
CustomObject7 MedEdEvent ( CustomObject7 Id )	CustomObject7	Events	1-M
CustomObject7 Opportunity ( CustomObject7 Id )	CustomObject7	Opportunities	1-M-PRIMARY
CustomObject7 Partner ( CustomObject7 Id )	CustomObject7	Partners	1-M
CustomObject7 Policy ( CustomObject7 Id )	CustomObject7	Policies	1-M
CustomObject7 Portfolio ( CustomObject7 Id )	CustomObject7	Portfolios	1-M
CustomObject7 Product ( CustomObject7 Id )	CustomObject7	Products	Child
CustomObject7 Program ( CustomObject7 Id )	CustomObject7	Partner Programs	1-M
CustomObject7 Revenue ( CustomObject7 Id )	CustomObject7	Revenues	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject7 Service Request ( CustomObject7 Id )	CustomObject7	Service Requests	1-M-PRIMARY
CustomObject7 SmartCall ( CustomObject7 Id )	CustomObject7	Smart Calls	1-M
CustomObject7 Solution ( CustomObject7 Id )	CustomObject7	Solutions	1-M
CustomObject7 SPRequest ( CustomObject7 Id )	CustomObject7	Special Pricing Requests	1-M
CustomObject7 Vehicle ( CustomObject7 Id )	CustomObject7	Vehicles	1-M
CustomObject7/Audit Trail Item 2	CustomObject7	Audit Trail	ReadOnly
CustomObject7/CustomObject7 Book	CustomObject7	Books	Child
CustomObject7/CustomObject7Team	CustomObject7	Custom Object 07 Teams	Child
CustomObject8	Not applicable	Custom Objects 08	Top
CustomObject8 Account ( CustomObject8 Id )	CustomObject8	Accounts	1-M
CustomObject8 Accreditation ( CustomObject8 Id )	CustomObject8	Accreditations	1-M
CustomObject8 Activity ( CustomObject8 Id )	CustomObject8	Activities	1-M-PRIMARY
CustomObject8 Asset ( CustomObject8 Id )	CustomObject8	Assets	1-M
CustomObject8 Campaign ( CustomObject8 Id )	CustomObject8	Campaigns	1-M
CustomObject8 Certification ( CustomObject8 Id )	CustomObject8	Certifications	1-M
CustomObject8 Channel Partner ( CustomObject8 Id )	CustomObject8	Dealers	1-M
CustomObject8 Cmpltd Activity	CustomObject8	Activities	1-M-PRIMARY
CustomObject8 Contact ( CustomObject8 Id )	CustomObject8	Contacts	1-M
CustomObject8 Course ( CustomObject8 Id )	CustomObject8	Courses	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject8 CRMOD_LS_Transactions ( CustomObject8 Id )	CustomObject8	Sample Transactions	1-M
CustomObject8 CRMODLS_InventoryPeriod ( CustomObject8 Id )	CustomObject8	Inventory Periods	1-M
CustomObject8 CRMODLS_SampleLot ( CustomObject8 Id )	CustomObject8	Sample Lots	1-M
CustomObject8 Custom Object 1 ( CustomObject8 Id )	CustomObject8	Custom Objects 01	1-M-PRIMARY
CustomObject8 Custom Object 2 ( CustomObject8 Id )	CustomObject8	Custom Objects 02	1-M-PRIMARY
CustomObject8 Custom Object 3 ( CustomObject8 Id )	CustomObject8	Custom Objects 03	1-M-PRIMARY
CustomObject8 CustomObject10 ( CustomObject8 Id )	CustomObject8	Custom Objects 10	1-M-PRIMARY
CustomObject8 CustomObject11 ( CustomObject8 Id )	CustomObject8	Custom Objects 11	1-M-PRIMARY
CustomObject8 CustomObject12 ( CustomObject8 Id )	CustomObject8	Custom Objects 12	1-M-PRIMARY
CustomObject8 CustomObject13 ( CustomObject8 Id )	CustomObject8	Custom Objects 13	1-M-PRIMARY
CustomObject8 CustomObject14 ( CustomObject8 Id )	CustomObject8	Custom Objects 14	1-M-PRIMARY
CustomObject8 CustomObject15 ( CustomObject8 Id )	CustomObject8	Custom Objects 15	1-M-PRIMARY
CustomObject8 CustomObject4 ( CustomObject8 Id )	CustomObject8	Custom Objects 04	1-M-PRIMARY
CustomObject8 CustomObject5 ( CustomObject8 Id )	CustomObject8	Custom Objects 05	1-M-PRIMARY
CustomObject8 CustomObject6 ( CustomObject8 Id )	CustomObject8	Custom Objects 06	1-M-PRIMARY



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject8 CustomObject7 ( CustomObject8 Id )	CustomObject8	Custom Objects 07	1-M-PRIMARY
CustomObject8 CustomObject8 ( CustomObject8 Id )	CustomObject8	Custom Objects 08	1-M-PRIMARY
CustomObject8 CustomObject9 ( CustomObject8 Id )	CustomObject8	Custom Objects 09	1-M-PRIMARY
CustomObject8 DealRegistration ( CustomObject8 Id )	CustomObject8	Deal Registrations	1-M
CustomObject8 Exam ( CustomObject8 Id )	CustomObject8	Exams	1-M
CustomObject8 FinancialAccount ( CustomObject8 Id )	CustomObject8	Financial Accounts	1-M-PRIMARY
CustomObject8 Fund ( CustomObject8 Id )	CustomObject8	Funds	1-M
CustomObject8 Fund Request ( CustomObject8 Id )	CustomObject8	Fund Requests	1-M
CustomObject8 Household ( CustomObject8 Id )	CustomObject8	Households	1-M
CustomObject8 Lead ( CustomObject8 Id )	CustomObject8	Leads	1-M-PRIMARY
CustomObject8 MDFRequest ( CustomObject8 Id )	CustomObject8	MDF Requests	1-M
CustomObject8 MedEdEvent ( CustomObject8 Id )	CustomObject8	Events	1-M
CustomObject8 Opportunity ( CustomObject8 Id )	CustomObject8	Opportunities	1-M-PRIMARY
CustomObject8 Partner ( CustomObject8 Id )	CustomObject8	Partners	1-M
CustomObject8 Policy ( CustomObject8 Id )	CustomObject8	Policies	1-M
CustomObject8 Portfolio ( CustomObject8 Id )	CustomObject8	Portfolios	1-M
CustomObject8 Product ( CustomObject8 Id )	CustomObject8	Products	Child
CustomObject8 Program ( CustomObject8 Id )	CustomObject8	Partner Programs	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject8 Revenue ( CustomObject8 Id )	CustomObject8	Revenues	Child
CustomObject8 Service Request ( CustomObject8 Id )	CustomObject8	Service Requests	1-M-PRIMARY
CustomObject8 SmartCall ( CustomObject8 Id )	CustomObject8	Smart Calls	1-M
CustomObject8 Solution ( CustomObject8 Id )	CustomObject8	Solutions	1-M
CustomObject8 SPRequest ( CustomObject8 Id )	CustomObject8	Special Pricing Requests	1-M
CustomObject8 Vehicle ( CustomObject8 Id )	CustomObject8	Vehicles	1-M
CustomObject8/Audit Trail Item 2	CustomObject8	Audit Trail	ReadOnly
CustomObject8/CustomObject8 Book	CustomObject8	Books	Child
CustomObject8/CustomObject8Team	CustomObject8	Custom Object 08 Teams	Child
CustomObject9	Not applicable	Custom Objects 09	Top
CustomObject9 Account ( CustomObject9 Id )	CustomObject9	Accounts	1-M
CustomObject9 Accreditation ( CustomObject9 Id )	CustomObject9	Accreditations	1-M
CustomObject9 Activity ( CustomObject9 Id )	CustomObject9	Activities	1-M-PRIMARY
CustomObject9 Asset ( CustomObject9 Id )	CustomObject9	Assets	1-M
CustomObject9 Campaign ( CustomObject9 Id )	CustomObject9	Campaigns	1-M
CustomObject9 Certification ( CustomObject9 Id )	CustomObject9	Certifications	1-M
CustomObject9 Channel Partner ( CustomObject9 Id )	CustomObject9	Dealers	1-M
CustomObject9 Cmpltd Activity	CustomObject9	Activities	1-M-PRIMARY
CustomObject9 Contact ( CustomObject9 Id )	CustomObject9	Contacts	1-M
CustomObject9 Course ( CustomObject9 Id )	CustomObject9	Courses	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject9 CRMOD_LS_Transactions ( CustomObject9 Id )	CustomObject9	Sample Transactions	1-M
CustomObject9 CRMODLS_InventoryPeriod ( CustomObject9 Id )	CustomObject9	Inventory Periods	1-M
CustomObject9 CRMODLS_SampleLot ( CustomObject9 Id )	CustomObject9	Sample Lots	1-M
CustomObject9 Custom Object 1 ( CustomObject9 Id )	CustomObject9	Custom Objects 01	1-M-PRIMARY
CustomObject9 Custom Object 2 ( CustomObject9 Id )	CustomObject9	Custom Objects 02	1-M-PRIMARY
CustomObject9 Custom Object 3 ( CustomObject9 Id )	CustomObject9	Custom Objects 03	1-M-PRIMARY
CustomObject9 CustomObject10 ( CustomObject9 Id )	CustomObject9	Custom Objects 10	1-M-PRIMARY
CustomObject9 CustomObject11 ( CustomObject9 Id )	CustomObject9	Custom Objects 11	1-M-PRIMARY
CustomObject9 CustomObject12 ( CustomObject9 Id )	CustomObject9	Custom Objects 12	1-M-PRIMARY
CustomObject9 CustomObject13 ( CustomObject9 Id )	CustomObject9	Custom Objects 13	1-M-PRIMARY
CustomObject9 CustomObject14 ( CustomObject9 Id )	CustomObject9	Custom Objects 14	1-M-PRIMARY
CustomObject9 CustomObject15 ( CustomObject9 Id )	CustomObject9	Custom Objects 15	1-M-PRIMARY
CustomObject9 CustomObject4 ( CustomObject9 Id )	CustomObject9	Custom Objects 04	1-M-PRIMARY
CustomObject9 CustomObject5 ( CustomObject9 Id )	CustomObject9	Custom Objects 05	1-M-PRIMARY
CustomObject9 CustomObject6 ( CustomObject9 Id )	CustomObject9	Custom Objects 06	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject9 CustomObject7 ( CustomObject9 Id )	CustomObject9	Custom Objects 07	1-M-PRIMARY
CustomObject9 CustomObject8 ( CustomObject9 Id )	CustomObject9	Custom Objects 08	1-M-PRIMARY
CustomObject9 CustomObject9 ( CustomObject9 Id )	CustomObject9	Custom Objects 09	1-M-PRIMARY
CustomObject9 DealRegistration ( CustomObject9 Id )	CustomObject9	Deal Registrations	1-M
CustomObject9 Exam ( CustomObject9 Id )	CustomObject9	Exams	1-M
CustomObject9 FinancialAccount ( CustomObject9 Id )	CustomObject9	Financial Accounts	1-M-PRIMARY
CustomObject9 Fund ( CustomObject9 Id )	CustomObject9	Funds	1-M
CustomObject9 Fund Request ( CustomObject9 Id )	CustomObject9	Fund Requests	1-M
CustomObject9 Household ( CustomObject9 Id )	CustomObject9	Households	1-M
CustomObject9 Lead ( CustomObject9 Id )	CustomObject9	Leads	1-M-PRIMARY
CustomObject9 MDFRequest ( CustomObject9 Id )	CustomObject9	MDF Requests	1-M
CustomObject9 MedEdEvent ( CustomObject9 Id )	CustomObject9	Events	1-M
CustomObject9 Opportunity ( CustomObject9 Id )	CustomObject9	Opportunities	1-M-PRIMARY
CustomObject9 Partner ( CustomObject9 Id )	CustomObject9	Partners	1-M
CustomObject9 Policy ( CustomObject9 Id )	CustomObject9	Policies	1-M
CustomObject9 Portfolio ( CustomObject9 Id )	CustomObject9	Portfolios	1-M
CustomObject9 Product ( CustomObject9 Id )	CustomObject9	Products	Child
CustomObject9 Program ( CustomObject9 Id )	CustomObject9	Partner Programs	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
CustomObject9 Revenue ( CustomObject9 Id )	CustomObject9	Revenues	Child
CustomObject9 Service Request ( CustomObject9 Id )	CustomObject9	Service Requests	1-M-PRIMARY
CustomObject9 SmartCall ( CustomObject9 Id )	CustomObject9	Smart Calls	1-M
CustomObject9 Solution ( CustomObject9 Id )	CustomObject9	Solutions	1-M
CustomObject9 SPRequest ( CustomObject9 Id )	CustomObject9	Special Pricing Requests	1-M
CustomObject9 Vehicle ( CustomObject9 Id )	CustomObject9	Vehicles	1-M
CustomObject9/Audit Trail Item 2	CustomObject9	Audit Trail	ReadOnly
CustomObject9/CustomObject9 Book	CustomObject9	Books	Child
CustomObject9/CustomObject9Team	CustomObject9	Custom Object 09 Teams	Child
CUT Address/Audit Trail Item 2	SharedAddress	Audit Trail	ReadOnly
Damage	Not applicable	Damages	Top
Damage/Audit Trail Item 2			
Dealer	Not applicable	Dealer	Top
Dealer Addr	Dealer	Addresses	Child
Dealer Att	Dealer	Attachments	Child
Dealer Book	Dealer	Books	Child
Dealer Cmpltd Activity	Dealer	Completed Activities	1-M-PRIMARY
Dealer Contact	Dealer	Contacts	M-M
Dealer CustObj1	Dealer	Custom Objects 01	M-M-PRIMARY
Dealer CustObj2	Dealer	Custom Objects 02	M-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Dealer CustObj3	Dealer	Custom Objects 03	M-M-PRIMARY
Dealer Makes	Dealer	Makes	Child
Dealer Note	Dealer	Notes	Child
Dealer Open Activity	Dealer	Open Activities	1-M-PRIMARY
Dealer Oppty	Dealer	Opportunities	1-M-PRIMARY
Dealer Sales Hours	Dealer	Sales Hours	Child
Dealer Service Hours	Dealer	Service Request Hours	Child
Dealer SR	Dealer	Service Requests	M-M-PRIMARY
Dealer Terr	Dealer	Territories	Child
Dealer Vehicle	Dealer	Vehicles	1-M
DealRegistration	Not applicable	Deal Registrations	Top
DealRegistration Activity ( DealRegistration Id )	DealRegistration	Activities	1-M-PRIMARY
DealRegistration Cmpltd Activity	DealRegistration	Activities	1-M-PRIMARY
DealRegistration Custom Object 1 ( Deal Registration Id )	DealRegistration	Custom Objects 01	1-M-PRIMARY
DealRegistration Custom Object 2 ( Deal Registration Id )	DealRegistration	Custom Objects 02	1-M-PRIMARY
DealRegistration Custom Object 3 ( Deal Registration Id )	DealRegistration	Custom Objects 03	1-M-PRIMARY
DealRegistration CustomObject10 ( Deal Registration Id )	DealRegistration	Custom Objects 10	1-M-PRIMARY
DealRegistration CustomObject11 ( Deal Registration Id )	DealRegistration	Custom Objects 11	1-M-PRIMARY
DealRegistration CustomObject12 ( Deal Registration Id )	DealRegistration	Custom Objects 12	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
DealRegistration CustomObject13 ( Deal Registration Id )	DealRegistration	Custom Objects 13	1-M-PRIMARY
DealRegistration CustomObject14 ( Deal Registration Id )	DealRegistration	Custom Objects 14	1-M-PRIMARY
DealRegistration CustomObject15 ( Deal Registration Id )	DealRegistration	Custom Objects 15	1-M-PRIMARY
DealRegistration CustomObject4 ( Deal Registration Id )	DealRegistration	Custom Objects 04	1-M-PRIMARY
DealRegistration CustomObject5 ( Deal Registration Id )	DealRegistration	Custom Objects 05	1-M-PRIMARY
DealRegistration CustomObject6 ( Deal Registration Id )	DealRegistration	Custom Objects 06	1-M-PRIMARY
DealRegistration CustomObject7 ( Deal Registration Id )	DealRegistration	Custom Objects 07	1-M-PRIMARY
DealRegistration CustomObject8 ( Deal Registration Id )	DealRegistration	Custom Objects 08	1-M-PRIMARY
DealRegistration CustomObject9 ( Deal Registration Id )	DealRegistration	Custom Objects 09	1-M-PRIMARY
DealRegistration DealRegistrationRevenue ( Deal Registration Id )	DealRegistration	Deal Registration Product Revenues	Child
DealRegistration Lead ( Deal Registration Id )	DealRegistration	Leads	1-M-PRIMARY
DealRegistration SmartCall ( DealRegistration Id )	DealRegistration	Smart Calls	1-M
DealRegistration SPRequest ( Deal Registration Id )	DealRegistration	Special Pricing Requests	1-M
DealRegistration/Audit Trail Item 2	DealRegistration	Audit Trail	ReadOnly
DealRegistration/DealRegistration Book	DealRegistration	Books	Child
DealRegistration/DealRegistrationTeam	DealRegistration	Deal Registration Teams	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
DealRegistrationRevenue	Not applicable	Deal Registration Product Revenues	Top
Employee	Not applicable		Top
Exam	Not applicable	Exams	Top
Exam CertificationExam ( Exam Id )	Exam	Certification Exams	Child
Exam Course ( Exam Id )	Exam	Courses	1-M
Exam CourseExam ( Exam Id )	Exam	Course Exams	Child
Exam Custom Object 1 ( Exam Id )	Exam	Custom Objects 01	1-M-PRIMARY
Exam Custom Object 2 ( Exam Id )	Exam	Custom Objects 02	1-M-PRIMARY
Exam Custom Object 3 ( Exam Id )	Exam	Custom Objects 03	1-M-PRIMARY
Exam CustomObject10 ( Exam Id )	Exam	Custom Objects 10	1-M-PRIMARY
Exam CustomObject11 ( Exam Id )	Exam	Custom Objects 11	1-M-PRIMARY
Exam CustomObject12 ( Exam Id )	Exam	Custom Objects 12	1-M-PRIMARY
Exam CustomObject13 ( Exam Id )	Exam	Custom Objects 13	1-M-PRIMARY
Exam CustomObject14 ( Exam Id )	Exam	Custom Objects 14	1-M-PRIMARY
Exam CustomObject15 ( Exam Id )	Exam	Custom Objects 15	1-M-PRIMARY
Exam CustomObject4 ( Exam Id )	Exam	Custom Objects 04	1-M-PRIMARY
Exam CustomObject5 ( Exam Id )	Exam	Custom Objects 05	1-M-PRIMARY
Exam CustomObject6 ( Exam Id )	Exam	Custom Objects 06	1-M-PRIMARY
Exam CustomObject7 ( Exam Id )	Exam	Custom Objects 07	1-M-PRIMARY
Exam CustomObject8 ( Exam Id )	Exam	Custom Objects 08	1-M-PRIMARY



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Exam CustomObject9 ( Exam Id )	Exam	Custom Objects 09	1-M-PRIMARY
Exam ExamAttachment ( Exam Id )	Exam	Exam Attachments	Child
Exam ExamCategory ( Exam Id )	Exam	Exam Product Product Categories	Child
Exam ExamPartner ( Exam Id )	Exam	Exam Partners	Child
Exam ExamProduct ( Exam Id )	Exam	Exam Products	Child
Exam ExamRegistration ( Exam Id )	Exam	Exam Registrations	1-M-PRIMARY
Exam ExamRelationship ( Exam Id )	Exam	Related Exams	Child
Exam ExamSolution ( Exam Id )	Exam	Exam Solutions	Child
Exam/Audit Trail Item 2	Exam	Audit Trail	ReadOnly
Exam/Exam Book	Exam	Books	Child
Exam/ExamTeam	Exam	Exam Teams	Child
ExamAttachment	Not applicable	Exam Attachments	Top
ExamCategory	Not applicable	Exam Product Product Categories	Top
ExamPartner	Not applicable	Exam Partners	Top
ExamProduct	Not applicable	Exam Products	Top
ExamRegistration	Not applicable	Exam Registrations	Top
ExamRelationship	Not applicable	Related Exams	Top
ExamSolution	Not applicable	Exam Solutions	Top
FinancialAccount	Not applicable	Financial Accounts	Top
FinancialAccount Activity ( Financial Account Id )	FinancialAccount	Activities	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
FinancialAccount Cmpltd Activity	FinancialAccount	Activities	1-M-PRIMARY
FinancialAccount Custom Object 1 ( Financial Account Id )	FinancialAccount	Custom Objects 01	1-M-PRIMARY
FinancialAccount Custom Object 2 ( Financial Account Id )	FinancialAccount	Custom Objects 02	1-M-PRIMARY
FinancialAccount Custom Object 3 ( Financial Account Id )	FinancialAccount	Custom Objects 03	1-M-PRIMARY
FinancialAccount CustomObject10 ( Financial Account Id )	FinancialAccount	Custom Objects 10	1-M-PRIMARY
FinancialAccount CustomObject11 ( Financial Account Id )	FinancialAccount	Custom Objects 11	1-M-PRIMARY
FinancialAccount CustomObject12 ( Financial Account Id )	FinancialAccount	Custom Objects 12	1-M-PRIMARY
FinancialAccount CustomObject13 ( Financial Account Id )	FinancialAccount	Custom Objects 13	1-M-PRIMARY
FinancialAccount CustomObject14 ( Financial Account Id )	FinancialAccount	Custom Objects 14	1-M-PRIMARY
FinancialAccount CustomObject15 ( Financial Account Id )	FinancialAccount	Custom Objects 15	1-M-PRIMARY
FinancialAccount CustomObject4 ( Financial Account Id )	FinancialAccount	Custom Objects 04	1-M-PRIMARY
FinancialAccount CustomObject5 ( Financial Account Id )	FinancialAccount	Custom Objects 05	1-M-PRIMARY
FinancialAccount CustomObject6 ( Financial Account Id )	FinancialAccount	Custom Objects 06	1-M-PRIMARY
FinancialAccount CustomObject7 ( Financial Account Id )	FinancialAccount	Custom Objects 07	1-M-PRIMARY
FinancialAccount CustomObject8 ( Financial Account Id )	FinancialAccount	Custom Objects 08	1-M-PRIMARY
FinancialAccount CustomObject9 ( Financial Account Id )	FinancialAccount	Custom Objects 09	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
FinancialAccount FinancialAccount ( Parent Financial Account Id )	FinancialAccount	Financial Accounts	1-M-PRIMARY
FinancialAccount FinancialAccountHolder ( Financial Account Id )	FinancialAccount	Financial Account Holders	1-M
FinancialAccount FinancialAccountHolding ( Financial Account Id )	FinancialAccount	Financial Account Holdings	1-M
FinancialAccount FinancialPlan ( Financial Account Id )	FinancialAccount	Financial Plans	1-M
FinancialAccount FinancialTransaction ( Financial Account Id )	FinancialAccount	Financial Transactions	1-M
FinancialAccount Lead ( Financial Account Id )	FinancialAccount	Leads	1-M-PRIMARY
FinancialAccount Opportunity ( Financial Account Id )	FinancialAccount	Opportunities	1-M-PRIMARY
FinancialAccount Policy ( Financial Account Id )	FinancialAccount	Policies	1-M
FinancialAccount Service Request ( Financial Account Id )	FinancialAccount	Service Requests	1-M-PRIMARY
FinancialAccount SmartCall ( Financial Account Id )	FinancialAccount	Smart Calls	1-M
FinancialAccount/Audit Trail Item 2	FinancialAccount	Audit Trail	ReadOnly
FinancialAccount/FinancialAccount Book	FinancialAccount	Books	Child
FinancialAccountHolder	Not applicable	Financial Account Holders	Top
FinancialAccountHolder/Audit Trail Item 2	FinancialAccountHolder	Audit Trail	ReadOnly
FinancialAccountHolding	Not applicable	Financial Account Holdings	Top
FinancialAccountHolding/Audit Trail Item 2	FinancialAccountHolding	Audit Trail	ReadOnly
FinancialPlan	Not applicable	Financial Plans	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
FinancialPlan Activity ( Financial Plan Id )	FinancialPlan	Activities	1-M-PRIMARY
FinancialPlan Cmpltd Activity	FinancialPlan	Activities	1-M-PRIMARY
FinancialPlan Lead ( Financial Plan Id )	FinancialPlan	Leads	1-M-PRIMARY
FinancialPlan Opportunity ( Financial Plan Id )	FinancialPlan	Opportunities	1-M-PRIMARY
FinancialPlan Service Request ( Financial Plan Id )	FinancialPlan	Service Requests	1-M-PRIMARY
FinancialPlan SmartCall ( Financial Plan Id )	FinancialPlan	Smart Calls	1-M
FinancialPlan/Audit Trail Item 2	FinancialPlan	Audit Trail	ReadOnly
FinancialPlan/FinancialPlan Book	FinancialPlan	Books	Child
FinancialProduct	Not applicable	Financial Products	Top
FinancialProduct Coverage ( Coverage Product Id )	FinancialProduct	Coverages	1-M
FinancialProduct FinancialAccountHolding ( Financial Product Id )	FinancialProduct	Financial Account Holdings	1-M
FinancialProduct FinancialProduct ( Parent Financial Product Id )	FinancialProduct	Financial Products	1-M
FinancialProduct FinancialTransaction ( Financial Product Id )	FinancialProduct	Financial Transactions	1-M
FinancialProduct/Audit Trail Item 2	FinancialProduct	Audit Trail	ReadOnly
FinancialTransaction	Not applicable	Financial Transactions	Top
FinancialTransaction FinancialTransaction ( Financial Transaction Parent Id )	FinancialTransaction	Financial Transactions	1-M
FinancialTransaction Service Request ( Financial Transaction Id )	FinancialTransaction	Service Requests	1-M-PRIMARY
FinancialTransaction/Audit Trail Item 2	FinancialTransaction	Audit Trail	ReadOnly
Forecast	Not applicable	Forecast	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
FR Att	Fund Request	Attachments	Child
FR Audit Trail	Fund Request	Audit Trail	ReadOnly
FR Cmpltd Activity	Fund Request	Completed Activities	1-M-PRIMARY
FR CustObj1	Fund Request	Custom Objects 01	M-M-PRIMARY
FR CustObj2	Fund Request	Custom Objects 02	M-M-PRIMARY
FR CustObj3	Fund Request	Custom Objects 03	M-M-PRIMARY
FR Note	Fund Request	Notes	Child
FR Open Activity	Fund Request	Open Activities	1-M-PRIMARY
Fund	Not applicable	Fund	Top
Fund Activity ( Fund Id )	Fund	Activities	1-M-PRIMARY
Fund Att	Fund	Attachments	Child
Fund Audit Trail	Fund	Audit Trail	ReadOnly
Fund Book	Fund	Books	Child
Fund Cmpltd Activity	Fund	Activities	1-M-PRIMARY
Fund Credit	Fund	Credits	Child
Fund CRMODLS_OBJECTIVE ( Fund Id )	Fund	Objectives	1-M-PRIMARY
Fund CustObj1	Fund	Custom Objects 01	M-M-PRIMARY
Fund CustObj2	Fund	Custom Objects 02	M-M-PRIMARY
Fund CustObj3	Fund	Custom Objects 03	M-M-PRIMARY
Fund CustomObject10 ( Fund Id )	Fund	Custom Objects 10	1-M-PRIMARY
Fund CustomObject11 ( Fund Id )	Fund	Custom Objects 11	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Fund CustomObject12 ( Fund Id )	Fund	Custom Objects 12	1-M-PRIMARY
Fund CustomObject13 ( Fund Id )	Fund	Custom Objects 13	1-M-PRIMARY
Fund CustomObject14 ( Fund Id )	Fund	Custom Objects 14	1-M-PRIMARY
Fund CustomObject15 ( Fund Id )	Fund	Custom Objects 15	1-M-PRIMARY
Fund CustomObject4 ( Fund Id )	Fund	Custom Objects 04	1-M-PRIMARY
Fund CustomObject5 ( Fund Id )	Fund	Custom Objects 05	1-M-PRIMARY
Fund CustomObject6 ( Fund Id )	Fund	Custom Objects 06	1-M-PRIMARY
Fund CustomObject7 ( Fund Id )	Fund	Custom Objects 07	1-M-PRIMARY
Fund CustomObject8 ( Fund Id )	Fund	Custom Objects 08	1-M-PRIMARY
Fund CustomObject9 ( Fund Id )	Fund	Custom Objects 09	1-M-PRIMARY
Fund Debit	Fund	Debits	Child
Fund Fund Request	Fund	Fund Requests	1-M
Fund MDFRequest ( Fund Id )	Fund	MDF Requests	1-M
Fund MedEdEvent ( Fund Id )	Fund	Events	1-M
Fund Note	Fund	Notes	Child
Fund Participant	Fund	Participants	M-M
Fund Partner	Fund	Partner	Child
Fund Request	Not applicable	Fund Request	Top
Fund Request CustomObject10 ( Fund Request Id )	Fund Request	Custom Objects 10	1-M-PRIMARY
Fund Request CustomObject11 ( Fund Request Id )	Fund Request	Custom Objects 11	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Fund Request CustomObject12 ( Fund Request Id )	Fund Request	Custom Objects 12	1-M-PRIMARY
Fund Request CustomObject13 ( Fund Request Id )	Fund Request	Custom Objects 13	1-M-PRIMARY
Fund Request CustomObject14 ( Fund Request Id )	Fund Request	Custom Objects 14	1-M-PRIMARY
Fund Request CustomObject15 ( Fund Request Id )	Fund Request	Custom Objects 15	1-M-PRIMARY
Fund Request CustomObject4 ( Fund Request Id )	Fund Request	Custom Objects 04	1-M-PRIMARY
Fund Request CustomObject5 ( Fund Request Id )	Fund Request	Custom Objects 05	1-M-PRIMARY
Fund Request CustomObject6 ( Fund Request Id )	Fund Request	Custom Objects 06	1-M-PRIMARY
Fund Request CustomObject7 ( Fund Request Id )	Fund Request	Custom Objects 07	1-M-PRIMARY
Fund Request CustomObject8 ( Fund Request Id )	Fund Request	Custom Objects 08	1-M-PRIMARY
Fund Request CustomObject9 ( Fund Request Id )	Fund Request	Custom Objects 09	1-M-PRIMARY
Fund SmartCall ( Fund Id )	Fund	Smart Calls	1-M
Fund SPRequest ( Fund Id )	Fund	Special Pricing Requests	1-M
HCPContactAllocation	Not applicable	HCP Contact Allocations	Top
HCPContactAllocation/Audit Trail Item 2	HCPContactAllocation	Audit Trail	ReadOnly
HCPContactAllocation/HCPContactAllocation Book	HCPContactAllocation	Books	Child
Household	Not applicable	Household	Top
Household Att	Household	Attachments	ReadOnly
Household Book	Household	Books	Child
Household Claim ( Household Id )	Household	Claims	1-M
Household Cmpltd Activity	Household	Completed Activities	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Household Contact	Household	Contacts	M-M
Household CustObj1	Household	Custom Objects 01	M-M-PRIMARY
Household CustObj2	Household	Custom Objects 02	M-M-PRIMARY
Household CustObj3	Household	Custom Objects 03	M-M-PRIMARY
Household CustomObject10 ( Household Id )	Household	Custom Objects 10	1-M-PRIMARY
Household CustomObject11 ( Household Id )	Household	Custom Objects 11	1-M-PRIMARY
Household CustomObject12 ( Household Id )	Household	Custom Objects 12	1-M-PRIMARY
Household CustomObject13 ( Household Id )	Household	Custom Objects 13	1-M-PRIMARY
Household CustomObject14 ( Household Id )	Household	Custom Objects 14	1-M-PRIMARY
Household CustomObject15 ( Household Id )	Household	Custom Objects 15	1-M-PRIMARY
Household CustomObject4 ( Household Id )	Household	Custom Objects 04	1-M-PRIMARY
Household CustomObject5 ( Household Id )	Household	Custom Objects 05	1-M-PRIMARY
Household CustomObject6 ( Household Id )	Household	Custom Objects 06	1-M-PRIMARY
Household CustomObject7 ( Household Id )	Household	Custom Objects 07	1-M-PRIMARY
Household CustomObject8 ( Household Id )	Household	Custom Objects 08	1-M-PRIMARY
Household CustomObject9 ( Household Id )	Household	Custom Objects 09	1-M-PRIMARY
Household FinancialAccount ( Household Id )	Household	Financial Accounts	1-M-PRIMARY
Household FinancialAccountHolder ( Household Id )	Household	Financial Account Holders	1-M
Household FinancialPlan ( Household Id )	Household	Financial Plans	1-M
Household Lead	Household	Leads	ReadOnly



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Household Note	Household	Notes	ReadOnly
Household Open Activity	Household	Open Activities	1-M-PRIMARY
Household Opportunity	Household	Opportunities	1-M-PRIMARY
Household Policy ( Household Id )	Household	Policies	1-M
Household PolicyHolder ( Household Holder Id )	Household	Policy Holders	1-M
Household Portfolio	Household	Portfolios	ReadOnly
Household SR	Household	Service Requests	1-M-PRIMARY
Household Team	Household	Household Team	Child
Household/Audit Trail Item 2	Household	Audit Trail	ReadOnly
Import Export	Not applicable	Import Export	Top
InsuranceProperty	Not applicable	Insurance Properties	Top
InsuranceProperty Coverage ( Insured Property Id )	InsuranceProperty	Coverages	1-M
InsuranceProperty Damage ( Property Id )	InsuranceProperty	Damages	1-M
InsuranceProperty/Audit Trail Item 2	InsuranceProperty	Audit Trail	ReadOnly
InvolvedParty	Not applicable	Involved Parties	Top
InvolvedParty/Audit Trail Item 2	InvolvedParty	Audit Trail	ReadOnly
Lead	Not applicable	Lead	Top
Lead Att	Lead	Attachments	Child
Lead Book	Lead	Books	Child
Lead Cmpltd Activity	Lead	Completed Activities	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Lead CustObj1	Lead	Custom Objects 01	M-M-PRIMARY
Lead CustObj2	Lead	Custom Objects 02	M-M-PRIMARY
Lead CustObj3	Lead	Custom Objects 03	M-M-PRIMARY
Lead CustomObject10 ( Lead Id )	Lead	Custom Objects 10	1-M-PRIMARY
Lead CustomObject11 ( Lead Id )	Lead	Custom Objects 11	1-M-PRIMARY
Lead CustomObject12 ( Lead Id )	Lead	Custom Objects 12	1-M-PRIMARY
Lead CustomObject13 ( Lead Id )	Lead	Custom Objects 13	1-M-PRIMARY
Lead CustomObject14 ( Lead Id )	Lead	Custom Objects 14	1-M-PRIMARY
Lead CustomObject15 ( Lead Id )	Lead	Custom Objects 15	1-M-PRIMARY
Lead CustomObject4 ( Lead Id )	Lead	Custom Objects 04	1-M-PRIMARY
Lead CustomObject5 ( Lead Id )	Lead	Custom Objects 05	1-M-PRIMARY
Lead CustomObject6 ( Lead Id )	Lead	Custom Objects 06	1-M-PRIMARY
Lead CustomObject7 ( Lead Id )	Lead	Custom Objects 07	1-M-PRIMARY
Lead CustomObject8 ( Lead Id )	Lead	Custom Objects 08	1-M-PRIMARY
Lead CustomObject9 ( Lead Id )	Lead	Custom Objects 09	1-M-PRIMARY
Lead DealRegistration ( Lead Id )	Lead	Deal Registrations	1-M
Lead LeadEvent ( Lead Id )	Lead	Lead Events	Child
Lead Open Activity	Lead	Open Activities	1-M-PRIMARY
Lead Partner	Lead	Partner	Child
Lead Sales Assmt	Lead	Lead Assessment	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Lead/Audit Trail Item 2	Lead	Audit Trail	ReadOnly
Lead/LeadTeam	Lead	Lead Teams	Child
LeadEvent	Not applicable	Lead Event	Top
LeadEvent/Audit Trail Item 2	LeadEvent	Audit Trail	ReadOnly
MDFRequest	Not applicable	MDF Requests	Top
MDFRequest Activity ( MDFRequest Id )	MDFRequest	Activities	1-M-PRIMARY
MDFRequest Cmpltd Activity	MDFRequest	Activities	1-M-PRIMARY
MDFRequest Custom Object 1 ( MDF Request Id )	MDFRequest	Custom Objects 01	1-M-PRIMARY
MDFRequest Custom Object 2 ( MDF Request Id )	MDFRequest	Custom Objects 02	1-M-PRIMARY
MDFRequest Custom Object 3 ( MDF Request Id )	MDFRequest	Custom Objects 03	1-M-PRIMARY
MDFRequest CustomObject10 ( MDF Request Id )	MDFRequest	Custom Objects 10	1-M-PRIMARY
MDFRequest CustomObject11 ( MDF Request Id )	MDFRequest	Custom Objects 11	1-M-PRIMARY
MDFRequest CustomObject12 ( MDF Request Id )	MDFRequest	Custom Objects 12	1-M-PRIMARY
MDFRequest CustomObject13 ( MDF Request Id )	MDFRequest	Custom Objects 13	1-M-PRIMARY
MDFRequest CustomObject14 ( MDF Request Id )	MDFRequest	Custom Objects 14	1-M-PRIMARY
MDFRequest CustomObject15 ( MDF Request Id )	MDFRequest	Custom Objects 15	1-M-PRIMARY
MDFRequest CustomObject4 ( MDF Request Id )	MDFRequest	Custom Objects 04	1-M-PRIMARY
MDFRequest CustomObject5 ( MDF Request Id )	MDFRequest	Custom Objects 05	1-M-PRIMARY
MDFRequest CustomObject6 ( MDF Request Id )	MDFRequest	Custom Objects 06	1-M-PRIMARY
MDFRequest CustomObject7 ( MDF Request Id )	MDFRequest	Custom Objects 07	1-M-PRIMARY
MDFRequest CustomObject8 ( MDF Request Id )	MDFRequest	Custom Objects 08	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
MDFRequest CustomObject9 ( MDF Request Id )	MDFRequest	Custom Objects 09	1-M-PRIMARY
MDFRequest MDFRequestAttachment ( MDFRequest Id )	MDFRequest	MDF Request Attachments	Child
MDFRequest SmartCall ( MDFRequest Id )	MDFRequest	Smart Calls	1-M
MDFRequest/Audit Trail Item 2	MDFRequest	Audit Trail	ReadOnly
MDFRequest/MDFRequest Book	MDFRequest	Books	Child
MDFRequest/MDFRequestTeam	MDFRequest	MDF Request Teams	Child
MDFRequestAttachment	Not applicable	MDF Request Attachments	Top
MedEd	Not applicable	Event	Top
MedEd Att	MedEd	Attachments	Child
MedEd Cmpltd Activity	MedEd	Completed Activities	1-M-PRIMARY
MedEd Contact	MedEd	Invitees	Child
MedEd CustObj1	MedEd	Custom Objects 01	M-M-PRIMARY
MedEd CustObj2	MedEd	Custom Objects 02	M-M-PRIMARY
MedEd CustObj3	MedEd	Custom Objects 03	M-M-PRIMARY
MedEd Invitee Audit Trail	MedEd	Invitee Audit Trail	ReadOnly
MedEd Open Activity	MedEd	Open Activities	1-M-PRIMARY
MedEdEvent AccountEvent ( Event Id )	MedEd	Account Event	Child
MedEdEvent Campaign ( Meded Id )	MedEd	Campaigns	1-M
MedEdEvent CRMODLS_BusinessPlan ( Meded Id )	MedEd	Business Plans	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
MedEdEvent CRMODLS_OBJECTIVE ( Meded Id )	MedEd	Objectives	1-M-PRIMARY
MedEdEvent CustomObject10 ( MedEd Id )	MedEd	Custom Objects 10	1-M-PRIMARY
MedEdEvent CustomObject11 ( MedEd Id )	MedEd	Custom Objects 11	1-M-PRIMARY
MedEdEvent CustomObject12 ( MedEd Id )	MedEd	Custom Objects 12	1-M-PRIMARY
MedEdEvent CustomObject13 ( MedEd Id )	MedEd	Custom Objects 13	1-M-PRIMARY
MedEdEvent CustomObject14 ( MedEd Id )	MedEd	Custom Objects 14	1-M-PRIMARY
MedEdEvent CustomObject15 ( MedEd Id )	MedEd	Custom Objects 15	1-M-PRIMARY
MedEdEvent CustomObject4 ( MedEd Id )	MedEd	Custom Objects 04	1-M-PRIMARY
MedEdEvent CustomObject5 ( MedEd Id )	MedEd	Custom Objects 05	1-M-PRIMARY
MedEdEvent CustomObject6 ( MedEd Id )	MedEd	Custom Objects 06	1-M-PRIMARY
MedEdEvent CustomObject7 ( MedEd Id )	MedEd	Custom Objects 07	1-M-PRIMARY
MedEdEvent CustomObject8 ( MedEd Id )	MedEd	Custom Objects 08	1-M-PRIMARY
MedEdEvent CustomObject9 ( MedEd Id )	MedEd	Custom Objects 09	1-M-PRIMARY
MedEdEvent Fund ( Meded Id )	MedEd	Funds	1-M
MedEdEvent LeadEvent ( Event Id )	MedEd	Lead Event	Child
MedEdEvent OpportunityEvent ( Event Id )	MedEd	Opportunity Event	Child
Objective Sales Assmt	CRMODLS_OBJECTIVE	Assessments	1-M
OnDemand Custom Object 1/Audit Trail Item 2	CustObj1	Audit Trail	ReadOnly
OnDemand Custom Object 2/Audit Trail Item 2	CustObj2	Audit Trail	ReadOnly
OnDemand Custom Object 3/Audit Trail Item 2	CustObj3	Audit Trail	ReadOnly
Opportunity	Not applicable	Opportunity	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Opportunity Asset ( Opportunity Id )	Opportunity	Assets	1-M
Opportunity CRMODLS_PlanOpportunities ( Opportunity Id )	Opportunity	Plan Opportunities	1-M-PRIMARY
Opportunity CustomObject10 ( Opportunity Id )	Opportunity	Custom Objects 10	1-M-PRIMARY
Opportunity CustomObject11 ( Opportunity Id )	Opportunity	Custom Objects 11	1-M-PRIMARY
Opportunity CustomObject12 ( Opportunity Id )	Opportunity	Custom Objects 12	1-M-PRIMARY
Opportunity CustomObject13 ( Opportunity Id )	Opportunity	Custom Objects 13	1-M-PRIMARY
Opportunity CustomObject14 ( Opportunity Id )	Opportunity	Custom Objects 14	1-M-PRIMARY
Opportunity CustomObject15 ( Opportunity Id )	Opportunity	Custom Objects 15	1-M-PRIMARY
Opportunity CustomObject4 ( Opportunity Id )	Opportunity	Custom Objects 04	1-M-PRIMARY
Opportunity CustomObject5 ( Opportunity Id )	Opportunity	Custom Objects 05	1-M-PRIMARY
Opportunity CustomObject6 ( Opportunity Id )	Opportunity	Custom Objects 06	1-M-PRIMARY
Opportunity CustomObject7 ( Opportunity Id )	Opportunity	Custom Objects 07	1-M-PRIMARY
Opportunity CustomObject8 ( Opportunity Id )	Opportunity	Custom Objects 08	1-M-PRIMARY
Opportunity CustomObject9 ( Opportunity Id )	Opportunity	Custom Objects 09	1-M-PRIMARY
Opportunity DealRegistration ( Opportunity Id )	Opportunity	Deal Registrations	1-M
Opportunity Opportunity ( Parent opty Id )	Opportunity	Sub- Opportunities	1-M-PRIMARY
Opportunity OpportunityEvent ( Opportunity Id )	Opportunity	Opportunity Events	Child
Opportunity Order ( Opportunity Id )	Opportunity	Orders	1-M
Opportunity Quote ( Opportunity Id )	Opportunity	Quotes	1-M
Opportunity Service Request ( Opportunity Id )	Opportunity	Service Requests	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Opportunity SPRequest ( Opportunity Id )	Opportunity	Special Pricing Requests	1-M
OpportunityEvent	Not applicable	Opportunity Event	Top
OpportunityEvent/Audit Trail Item 2	OpportunityEvent	Audit Trail	ReadOnly
Oppty Att	Opportunity	Attachments	Child
Oppty Audit Trail	Opportunity	Audit Trail	ReadOnly
Oppty Book	Opportunity	Books	Child
Oppty Cmpltd Activity	Opportunity	Completed Activities	1-M-PRIMARY
Oppty Competitor	Opportunity	Opportunity Competitors	Child
Oppty Contact	Opportunity	Contacts	Child
Oppty CustObj1	Opportunity	Custom Objects 01	M-M-PRIMARY
Oppty CustObj2	Opportunity	Custom Objects 02	M-M-PRIMARY
Oppty CustObj3	Opportunity	Custom Objects 03	M-M-PRIMARY
Oppty Lead	Opportunity	Leads	1-M-PRIMARY
Oppty Note	Opportunity	Notes	Child
Oppty Open Activity	Opportunity	Open Activities	1-M-PRIMARY
Oppty Partner	Opportunity	Opportunity Partners	Child
Oppty Revenue	Opportunity	Revenues	Child
Oppty Sales Assmt	Opportunity	Opportunity Assessment	1-M
Oppty Team	Opportunity	Opportunity Team	Child
Order	Not applicable	Orders	Top

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Order Custom Object 1 ( Order Id )	Order	Custom Objects 01	1-M-PRIMARY
Order Custom Object 2 ( Order Id )	Order	Custom Objects 02	1-M-PRIMARY
Order Custom Object 3 ( Order Id )	Order	Custom Objects 03	1-M-PRIMARY
Order CustomObject10 ( Order Id )	Order	Custom Objects 10	1-M-PRIMARY
Order CustomObject11 ( Order Id )	Order	Custom Objects 11	1-M-PRIMARY
Order CustomObject12 ( Order Id )	Order	Custom Objects 12	1-M-PRIMARY
Order CustomObject13 ( Order Id )	Order	Custom Objects 13	1-M-PRIMARY
Order CustomObject14 ( Order Id )	Order	Custom Objects 14	1-M-PRIMARY
Order CustomObject15 ( Order Id )	Order	Custom Objects 15	1-M-PRIMARY
Order CustomObject4 ( Order Id )	Order	Custom Objects 04	1-M-PRIMARY
Order CustomObject5 ( Order Id )	Order	Custom Objects 05	1-M-PRIMARY
Order CustomObject6 ( Order Id )	Order	Custom Objects 06	1-M-PRIMARY
Order CustomObject7 ( Order Id )	Order	Custom Objects 07	1-M-PRIMARY
Order CustomObject8 ( Order Id )	Order	Custom Objects 08	1-M-PRIMARY
Order CustomObject9 ( Order Id )	Order	Custom Objects 09	1-M-PRIMARY
Order OrderItem ( Order Id )	Order	Order Items	1-M
Order/Audit Trail Item 2	Order	Audit Trail	ReadOnly
Order/Order Book	Order	Books	Child
Order/OrderTeam	Order	Order Teams	Child
OrderItem	Not applicable	Order Items	Top
OrderItem Custom Object 1 ( Order Item Id )	OrderItem	Custom Objects 01	1-M-PRIMARY



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
OrderItem Custom Object 2 ( Order Item Id )	OrderItem	Custom Objects 02	1-M-PRIMARY
OrderItem Custom Object 3 ( Order Item Id )	OrderItem	Custom Objects 03	1-M-PRIMARY
OrderItem CustomObject10 ( Order Item Id )	OrderItem	Custom Objects 10	1-M-PRIMARY
OrderItem CustomObject11 ( Order Item Id )	OrderItem	Custom Objects 11	1-M-PRIMARY
OrderItem CustomObject12 ( Order Item Id )	OrderItem	Custom Objects 12	1-M-PRIMARY
OrderItem CustomObject13 ( Order Item Id )	OrderItem	Custom Objects 13	1-M-PRIMARY
OrderItem CustomObject14 ( Order Item Id )	OrderItem	Custom Objects 14	1-M-PRIMARY
OrderItem CustomObject15 ( Order Item Id )	OrderItem	Custom Objects 15	1-M-PRIMARY
OrderItem CustomObject4 ( Order Item Id )	OrderItem	Custom Objects 04	1-M-PRIMARY
OrderItem CustomObject5 ( Order Item Id )	OrderItem	Custom Objects 05	1-M-PRIMARY
OrderItem CustomObject6 ( Order Item Id )	OrderItem	Custom Objects 06	1-M-PRIMARY
OrderItem CustomObject7 ( Order Item Id )	OrderItem	Custom Objects 07	1-M-PRIMARY
OrderItem CustomObject8 ( Order Item Id )	OrderItem	Custom Objects 08	1-M-PRIMARY
OrderItem CustomObject9 ( Order Item Id )	OrderItem	Custom Objects 09	1-M-PRIMARY
Partner	Not applicable	Partner	Top
Partner Account	Partner	Account	Child
Partner AccreditationRequest ( Partner Id )	Partner	Accreditation Requests	1-M-PRIMARY
Partner Address	Partner	Addresses	Child
Partner Application ( Associated Partner Id )	Partner	Applications	1-M
Partner Attachment	Partner	Attachments	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Partner Book	Partner	Partner Organization Books	Child
Partner BrokerProfile ( Partner Name Id )	Partner	Broker Profiles	1-M
Partner Cmpltd Activity	Partner	Completed Activities	1-M-PRIMARY
Partner Contact	Partner	Contacts	M-M
Partner CourseEnrollment ( Offering Partner Id )	Partner	Course Enrollments	1-M-PRIMARY
Partner CoursePartner ( Partner Id )	Partner	Course Partners	Child
Partner CRMODLS_BusinessPlan ( Principal Partner Id )	Partner	Business Plans	1-M-PRIMARY
Partner CustObj1	Partner	Custom Objects 01	M-M-PRIMARY
Partner CustObj2	Partner	Custom Objects 02	M-M-PRIMARY
Partner CustObj3	Partner	Custom Objects 03	M-M-PRIMARY
Partner CustomObject10 ( Partner Id )	Partner	Custom Objects 10	1-M-PRIMARY
Partner CustomObject11 ( Partner Id )	Partner	Custom Objects 11	1-M-PRIMARY
Partner CustomObject12 ( Partner Id )	Partner	Custom Objects 12	1-M-PRIMARY
Partner CustomObject13 ( Partner Id )	Partner	Custom Objects 13	1-M-PRIMARY
Partner CustomObject14 ( Partner Id )	Partner	Custom Objects 14	1-M-PRIMARY
Partner CustomObject15 ( Partner Id )	Partner	Custom Objects 15	1-M-PRIMARY
Partner CustomObject4 ( Partner Id )	Partner	Custom Objects 04	1-M-PRIMARY
Partner CustomObject5 ( Partner Id )	Partner	Custom Objects 05	1-M-PRIMARY
Partner CustomObject6 ( Partner Id )	Partner	Custom Objects 06	1-M-PRIMARY
Partner CustomObject7 ( Partner Id )	Partner	Custom Objects 07	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Partner CustomObject8 ( Partner Id )	Partner	Custom Objects 08	1-M-PRIMARY
Partner CustomObject9 ( Partner Id )	Partner	Custom Objects 09	1-M-PRIMARY
Partner DealRegistration ( Partner Id )	Partner	Deal Registrations	1-M
Partner ExamPartner ( Partner Id )	Partner	Exam Partners	Child
Partner ExamRegistration ( Partner Id )	Partner	Exam Registrations	1-M-PRIMARY
Partner Fund	Partner	Fund	Child
Partner Fund Request ( Principal Partner Account Id )	Partner	Fund Requests	1-M
Partner Lead	Partner	Lead	Child
Partner MDFRequest ( Principal Partner Account Id )	Partner	MDF Requests	1-M
Partner Note	Partner	Notes	Child
Partner Open Activity	Partner	Open Activities	1-M-PRIMARY
Partner Opportunity	Partner	Opportunity	Child
Partner PartnerCampaign ( Partner Id )	Partner	Partner Campaigns	Child
Partner PartnerPlan ( Partner Id )	Partner	Partner Plans	Child
Partner PartnerType ( Partner Id )	Partner	Partner Types	Child
Partner Policy ( Carrier Id )	Partner	Policies	1-M
Partner Policy ( Primary Agency Id )	Partner	Policies	1-M
Partner Programs	Partner	Program Membership	Child
Partner Rel	Partner	Partner Relationships	Child
Partner Service Request ( Principal Partner Id )	Partner	Service Requests	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Partner SPPartner ( Partner Id )	Partner	Partner Special Pricing Requests	Child
Partner SPRequest ( Principal Partner Account Id )	Partner	Special Pricing Requests	1-M
Partner/Audit Trail Item 2	Partner	Audit Trail	ReadOnly
Partner/Partner Book	Partner	Books	Child
Partner/PartnerTeam	Partner	Partner Teams	Child
PartnerCampaign	Not applicable	Partner Campaigns	Top
PartnerPlan	Not applicable	Partner Plans	Top
PartnerType	Not applicable	Partner Types	Top
PartnerType Partner ( Primary Partner Type Id )	PartnerType	Partners	1-M
Patient	Not applicable	Patient	Top
Patient Asset	Patient	Assets	M-M
Patient Contact	Patient	Relationships	M-M
Patient Note	Patient	Notes	Child
Patient Team	Patient	Patient Team	Child
Pharma ME Event/Audit Trail Item 2	MedEd	Audit Trail	ReadOnly
Pharma ME Event/Pharma ME Event Book	MedEd	Books	Child
Pharma ME Event/Pharma ME EventTeam	MedEd	Event Teams	Child
Policy	Not applicable	Policies	Top
Policy Activity ( Policy Id )	Policy	Activities	1-M-PRIMARY
Policy Claim ( Policy Id )	Policy	Claims	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Policy Cmpltd Activity	Policy	Activities	1-M-PRIMARY
Policy Coverage ( Policy Id )	Policy	Coverages	1-M
Policy Custom Object 1 ( Policy Id )	Policy	Custom Objects 01	1-M-PRIMARY
Policy Custom Object 2 ( Policy Id )	Policy	Custom Objects 02	1-M-PRIMARY
Policy Custom Object 3 ( Policy Id )	Policy	Custom Objects 03	1-M-PRIMARY
Policy CustomObject10 ( Policy Id )	Policy	Custom Objects 10	1-M-PRIMARY
Policy CustomObject11 ( Policy Id )	Policy	Custom Objects 11	1-M-PRIMARY
Policy CustomObject12 ( Policy Id )	Policy	Custom Objects 12	1-M-PRIMARY
Policy CustomObject13 ( Policy Id )	Policy	Custom Objects 13	1-M-PRIMARY
Policy CustomObject14 ( Policy Id )	Policy	Custom Objects 14	1-M-PRIMARY
Policy CustomObject15 ( Policy Id )	Policy	Custom Objects 15	1-M-PRIMARY
Policy CustomObject4 ( Policy Id )	Policy	Custom Objects 04	1-M-PRIMARY
Policy CustomObject5 ( Policy Id )	Policy	Custom Objects 05	1-M-PRIMARY
Policy CustomObject6 ( Policy Id )	Policy	Custom Objects 06	1-M-PRIMARY
Policy CustomObject7 ( Policy Id )	Policy	Custom Objects 07	1-M-PRIMARY
Policy CustomObject8 ( Policy Id )	Policy	Custom Objects 08	1-M-PRIMARY
Policy CustomObject9 ( Policy Id )	Policy	Custom Objects 09	1-M-PRIMARY
Policy InsuranceProperty ( Policy Id )	Policy	Insurance Properties	1-M
Policy Lead ( Policy Id )	Policy	Leads	1-M-PRIMARY
Policy Opportunity ( Policy Id )	Policy	Opportunities	1-M-PRIMARY
Policy Policy ( Parent Policy Id )	Policy	Policies	1-M

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Policy PolicyAttachment ( Policy Id )	Policy	Policy Attachments	Child
Policy PolicyHolder ( Policy Id )	Policy	Policy Holders	1-M
Policy Service Request ( Policy Id )	Policy	Service Requests	1-M-PRIMARY
Policy SmartCall ( Policy Id )	Policy	Smart Calls	1-M
Policy/Audit Trail Item 2	Policy	Audit Trail	ReadOnly
Policy/Policy Book	Policy	Books	Child
PolicyAttachment	Not applicable	Policy Attachments	Top
PolicyHolder	Not applicable	Policy Holders	Top
PolicyHolder/Audit Trail Item 2	PolicyHolder	Audit Trail	ReadOnly
Portfolio	Not applicable	Portfolio	Top
Portfolio Book	Portfolio	Books	Child
Portfolio Cmpltd Activity	Portfolio	Completed Activities	1-M-PRIMARY
Portfolio Contact	Portfolio	Contacts	Child
Portfolio CustObj1	Portfolio	Custom Objects 01	M-M-PRIMARY
Portfolio CustObj2	Portfolio	Custom Objects 02	M-M-PRIMARY
Portfolio CustObj3	Portfolio	Custom Objects 03	M-M-PRIMARY
Portfolio CustomObject10 ( Portfolio Id )	Portfolio	Custom Objects 10	1-M-PRIMARY
Portfolio CustomObject11 ( Portfolio Id )	Portfolio	Custom Objects 11	1-M-PRIMARY
Portfolio CustomObject12 ( Portfolio Id )	Portfolio	Custom Objects 12	1-M-PRIMARY
Portfolio CustomObject13 ( Portfolio Id )	Portfolio	Custom Objects 13	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Portfolio CustomObject14 ( Portfolio Id )	Portfolio	Custom Objects 14	1-M-PRIMARY
Portfolio CustomObject15 ( Portfolio Id )	Portfolio	Custom Objects 15	1-M-PRIMARY
Portfolio CustomObject4 ( Portfolio Id )	Portfolio	Custom Objects 04	1-M-PRIMARY
Portfolio CustomObject5 ( Portfolio Id )	Portfolio	Custom Objects 05	1-M-PRIMARY
Portfolio CustomObject6 ( Portfolio Id )	Portfolio	Custom Objects 06	1-M-PRIMARY
Portfolio CustomObject7 ( Portfolio Id )	Portfolio	Custom Objects 07	1-M-PRIMARY
Portfolio CustomObject8 ( Portfolio Id )	Portfolio	Custom Objects 08	1-M-PRIMARY
Portfolio CustomObject9 ( Portfolio Id )	Portfolio	Custom Objects 09	1-M-PRIMARY
Portfolio FinancialAccount ( Portfolio Id )	Portfolio	Financial Accounts	1-M-PRIMARY
Portfolio FinancialPlan ( Portfolio Id )	Portfolio	Financial Plans	1-M
Portfolio Open Activity	Portfolio	Open Activities	1-M-PRIMARY
Portfolio Sub Portfolio	Portfolio	Portfolio Sub-Accounts	1-M
Portfolio Team	Portfolio	Portfolio Team	Child
ProductIndication	Not applicable	Product Indications	Top
ProductIndication/Audit Trail Item 2	ProductIndication	Audit Trail	ReadOnly
Program	Not applicable	Partner Program	Top
Program Application ( Partner Program Id )	Program	Applications	1-M
Program Book	Program	Books	Child
Program CustomObject10 ( Program Id )	Program	Custom Objects 10	1-M-PRIMARY
Program CustomObject11 ( Program Id )	Program	Custom Objects 11	1-M-PRIMARY
Program CustomObject12 ( Program Id )	Program	Custom Objects 12	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Program CustomObject13 ( Program Id )	Program	Custom Objects 13	1-M-PRIMARY
Program CustomObject14 ( Program Id )	Program	Custom Objects 14	1-M-PRIMARY
Program CustomObject15 ( Program Id )	Program	Custom Objects 15	1-M-PRIMARY
Program CustomObject4 ( Program Id )	Program	Custom Objects 04	1-M-PRIMARY
Program CustomObject5 ( Program Id )	Program	Custom Objects 05	1-M-PRIMARY
Program CustomObject6 ( Program Id )	Program	Custom Objects 06	1-M-PRIMARY
Program CustomObject7 ( Program Id )	Program	Custom Objects 07	1-M-PRIMARY
Program CustomObject8 ( Program Id )	Program	Custom Objects 08	1-M-PRIMARY
Program CustomObject9 ( Program Id )	Program	Custom Objects 09	1-M-PRIMARY
Program DealRegistration ( Partner Program Id )	Program	Deal Registrations	1-M
Program Fund Request ( Partner Program Id )	Program	Fund Requests	1-M
Program MDFRequest ( Partner Program Id )	Program	MDF Requests	1-M
Program Opportunity ( Program Id )	Program	Opportunities	1-M-PRIMARY
Program ProgramAttachment ( Program Id )	Program	Partner Program Attachments	Child
Program SPRequest ( Partner Program Id )	Program	Special Pricing Requests	1-M
Program/Audit Trail Item 2	Program	Audit Trail	ReadOnly
ProgramAttachment	Not applicable	Partner Program Attachments	Top
ProgramMember	Not applicable	Program Membership	Top
ProgramMemberAtt	ProgramMember	Attachments	Child
ProgramPartner	Program	Program Membership	Child



Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Quote	Not applicable	Quotes	Top
Quote/Audit Trail Item 2	Quote	Audit Trail	ReadOnly
SA Value	Sales Assmt	Values	Child
Sales Assmt	Not applicable	Assessment	Top
SampleRequest	Not applicable	Sample Requests	Top
SampleRequest SampleRequestItem ( SampleRequest Id )	SampleRequest	Sample Request Items	1-M
SampleRequest/Audit Trail Item 2	SampleRequest	Audit Trail	ReadOnly
SampleRequest/SampleRequest Book	SampleRequest	Books	Child
SampleRequest/SampleRequestTeam	SampleRequest	Sample Request Teams	Child
SampleRequestItem	Not applicable	Sample Request Items	Top
SampleRequestItem/Audit Trail Item 2	SampleRequestItem	Audit Trail	ReadOnly
SC Prod Detail	Smart Call	Products Detailed	Child
SC PromItem Drop	Smart Call	Promotional Item Dropped	Child
SC Samp Drop	Smart Call	Samples Dropped	Child
Service Request	Not applicable	Service Request	Top
Service Request CustomObject10 ( Service Request Id )	Service Request	Custom Objects 10	1-M-PRIMARY
Service Request CustomObject11 ( Service Request Id )	Service Request	Custom Objects 11	1-M-PRIMARY
Service Request CustomObject12 ( Service Request Id )	Service Request	Custom Objects 12	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Service Request CustomObject13 ( Service Request Id )	Service Request	Custom Objects 13	1-M-PRIMARY
Service Request CustomObject14 ( Service Request Id )	Service Request	Custom Objects 14	1-M-PRIMARY
Service Request CustomObject15 ( Service Request Id )	Service Request	Custom Objects 15	1-M-PRIMARY
Service Request CustomObject4 ( Service Request Id )	Service Request	Custom Objects 04	1-M-PRIMARY
Service Request CustomObject5 ( Service Request Id )	Service Request	Custom Objects 05	1-M-PRIMARY
Service Request CustomObject6 ( Service Request Id )	Service Request	Custom Objects 06	1-M-PRIMARY
Service Request CustomObject7 ( Service Request Id )	Service Request	Custom Objects 07	1-M-PRIMARY
Service Request CustomObject8 ( Service Request Id )	Service Request	Custom Objects 08	1-M-PRIMARY
Service Request CustomObject9 ( Service Request Id )	Service Request	Custom Objects 09	1-M-PRIMARY
Service Request/Service RequestTeam	Service Request	Service Request Teams	Child
SharedAddress	Not applicable	Address	Top
SharedAddress Account ( Address Id )	SharedAddress	Accounts	M-M
SharedAddress Channel Partner ( Address Id )	SharedAddress	Dealers	1-M
SharedAddress Contact ( Address Id )	SharedAddress	Contacts	1-M
SharedAddress Custom Object 1 ( Address Id )	SharedAddress	Custom Objects 01	1-M-PRIMARY
SharedAddress Custom Object 2 ( Address Id )	SharedAddress	Custom Objects 02	1-M-PRIMARY
SharedAddress Custom Object 3 ( Address Id )	SharedAddress	Custom Objects 03	1-M-PRIMARY
SharedAddress CustomObject10 ( Address Id )	SharedAddress	Custom Objects 10	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
SharedAddress CustomObject11 ( Address Id )	SharedAddress	Custom Objects 11	1-M-PRIMARY
SharedAddress CustomObject12 ( Address Id )	SharedAddress	Custom Objects 12	1-M-PRIMARY
SharedAddress CustomObject13 ( Address Id )	SharedAddress	Custom Objects 13	1-M-PRIMARY
SharedAddress CustomObject14 ( Address Id )	SharedAddress	Custom Objects 14	1-M-PRIMARY
SharedAddress CustomObject15 ( Address Id )	SharedAddress	Custom Objects 15	1-M-PRIMARY
SharedAddress CustomObject4 ( Address Id )	SharedAddress	Custom Objects 04	1-M-PRIMARY
SharedAddress CustomObject5 ( Address Id )	SharedAddress	Custom Objects 05	1-M-PRIMARY
SharedAddress CustomObject6 ( Address Id )	SharedAddress	Custom Objects 06	1-M-PRIMARY
SharedAddress CustomObject7 ( Address Id )	SharedAddress	Custom Objects 07	1-M-PRIMARY
SharedAddress CustomObject8 ( Address Id )	SharedAddress	Custom Objects 08	1-M-PRIMARY
SharedAddress CustomObject9 ( Address Id )	SharedAddress	Custom Objects 09	1-M-PRIMARY
SharedAddress Partner ( Address Id )	SharedAddress	Partners	1-M
Smart Call	Not applicable	Smart Call	Top
SmartCall Book	Smart Call	Books	Child
SocialMedia	Not applicable	Social Media	Top
SocialMedia Service Request ( Social Media Source Id )	SocialMedia	Service Requests	1-M-PRIMARY
SocialMedia/Audit Trail Item 2	SocialMedia	Audit Trail	ReadOnly
SocialProfile	Not applicable	Social Profiles	Top
SocialProfile/Audit Trail Item 2	SocialProfile	Audit Trail	ReadOnly
Soln Att	Solution	Attachments	Child

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Soln CustObj1	Solution	Custom Objects 01	M-M-PRIMARY
Soln CustObj2	Solution	Custom Objects 02	M-M-PRIMARY
Soln CustObj3	Solution	Custom Objects 03	M-M-PRIMARY
Soln Product	Solution	Solution Product	1-M
Soln Related Soln	Solution	Related Solutions	M-M
Soln SR	Solution	Service Requests	M-M-PRIMARY
Solution	Not applicable	Solution	Top
Solution AccreditationSolution ( Solution Id )	Solution	Accreditation Solutions	Child
Solution CertificationSolution ( Solution Id )	Solution	Certification Solutions	Child
Solution CourseSolution ( Solution Id )	Solution	Course Solutions	Child
Solution CRMOD_LS_MessagingPlan ( Solution Id )	Solution	Messaging Plans	1-M
Solution CRMOD_LS_MsgPlanItem ( Solution Name Id )	Solution	Messaging Plan Items	1-M-PRIMARY
Solution CRMOD_LS_MsgPlnRel ( Solution Name Id )	Solution	Messaging Plan Item Relations	1-M-PRIMARY
Solution CustomObject10 ( Solution Id )	Solution	Custom Objects 10	1-M-PRIMARY
Solution CustomObject11 ( Solution Id )	Solution	Custom Objects 11	1-M-PRIMARY
Solution CustomObject12 ( Solution Id )	Solution	Custom Objects 12	1-M-PRIMARY
Solution CustomObject13 ( Solution Id )	Solution	Custom Objects 13	1-M-PRIMARY
Solution CustomObject14 ( Solution Id )	Solution	Custom Objects 14	1-M-PRIMARY
Solution CustomObject15 ( Solution Id )	Solution	Custom Objects 15	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Solution CustomObject4 ( Solution Id )	Solution	Custom Objects 04	1-M-PRIMARY
Solution CustomObject5 ( Solution Id )	Solution	Custom Objects 05	1-M-PRIMARY
Solution CustomObject6 ( Solution Id )	Solution	Custom Objects 06	1-M-PRIMARY
Solution CustomObject7 ( Solution Id )	Solution	Custom Objects 07	1-M-PRIMARY
Solution CustomObject8 ( Solution Id )	Solution	Custom Objects 08	1-M-PRIMARY
Solution CustomObject9 ( Solution Id )	Solution	Custom Objects 09	1-M-PRIMARY
Solution ExamSolution ( Solution Id )	Solution	Exam Solutions	Child
Solution/Audit Trail Item 2	Solution	Audit Trail	ReadOnly
Solution/Solution Book	Solution	Books	Child
SPPartner	Not applicable	Partner Special Pricing Requests	Top
SPRequest	Not applicable	Special Pricing Requests	Top
SPRequest Activity ( SPRequest Id )	SPRequest	Activities	1-M-PRIMARY
SPRequest Cmpltd Activity	SPRequest	Activities	1-M-PRIMARY
SPRequest Custom Object 1 ( SP Request Id )	SPRequest	Custom Objects 01	1-M-PRIMARY
SPRequest Custom Object 2 ( SP Request Id )	SPRequest	Custom Objects 02	1-M-PRIMARY
SPRequest Custom Object 3 ( SP Request Id )	SPRequest	Custom Objects 03	1-M-PRIMARY
SPRequest CustomObject10 ( SP Request Id )	SPRequest	Custom Objects 10	1-M-PRIMARY
SPRequest CustomObject11 ( SP Request Id )	SPRequest	Custom Objects 11	1-M-PRIMARY
SPRequest CustomObject12 ( SP Request Id )	SPRequest	Custom Objects 12	1-M-PRIMARY
SPRequest CustomObject13 ( SP Request Id )	SPRequest	Custom Objects 13	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
SPRequest CustomObject14 ( SP Request Id )	SPRequest	Custom Objects 14	1-M-PRIMARY
SPRequest CustomObject15 ( SP Request Id )	SPRequest	Custom Objects 15	1-M-PRIMARY
SPRequest CustomObject4 ( SP Request Id )	SPRequest	Custom Objects 04	1-M-PRIMARY
SPRequest CustomObject5 ( SP Request Id )	SPRequest	Custom Objects 05	1-M-PRIMARY
SPRequest CustomObject6 ( SP Request Id )	SPRequest	Custom Objects 06	1-M-PRIMARY
SPRequest CustomObject7 ( SP Request Id )	SPRequest	Custom Objects 07	1-M-PRIMARY
SPRequest CustomObject8 ( SP Request Id )	SPRequest	Custom Objects 08	1-M-PRIMARY
SPRequest CustomObject9 ( SP Request Id )	SPRequest	Custom Objects 09	1-M-PRIMARY
SPRequest SmartCall ( SPRequest Id )	SPRequest	Smart Calls	1-M
SPRequest SPPartner ( SP Request Id )	SPRequest	Partner Special Pricing Requests	Child
SPRequest SPRequestAttachment ( SPRequest Id )	SPRequest	Special Pricing Request Attachments	Child
SPRequest SPRequestLineItem ( SP Request Id )	SPRequest	Special Pricing Products	Child
SPRequest/Audit Trail Item 2	SPRequest	Audit Trail	ReadOnly
SPRequest/SPRequest Book	SPRequest	Books	Child
SPRequest/SPRequestTeam	SPRequest	Special Pricing Request Teams	Child
SPRequestAttachment	Not applicable	Special Pricing Request Attachments	Top
SPRequestLineItem	Not applicable	Special Pricing Products	Top
SR Att	Service Request	Attachments	Child
SR Audit Trail	Service Request	Audit Trail	ReadOnly

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
SR Book	Service Request	Books	Child
SR Cmpltd Activity	Service Request	Completed Activities	1-M-PRIMARY
SR CustObj1	Service Request	Custom Objects 01	M-M-PRIMARY
SR CustObj2	Service Request	Custom Objects 02	M-M-PRIMARY
SR CustObj3	Service Request	Custom Objects 03	M-M-PRIMARY
SR Note	Service Request	Notes	Child
SR Open Activity	Service Request	Open Activities	1-M-PRIMARY
SR Sales Assmt	Service Request	SR Assessment	1-M
SR Solution	Service Request	Solutions	M-M
User	Not applicable		Top
Vehicle	Not applicable	Vehicle	Top
Vehicle Book	Vehicle	Books	Child
Vehicle Contact	Vehicle	Contacts	M-M
Vehicle CustObj1	Vehicle	Custom Objects 01	M-M-PRIMARY
Vehicle CustObj2	Vehicle	Custom Objects 02	M-M-PRIMARY
Vehicle CustObj3	Vehicle	Custom Objects 03	M-M-PRIMARY
Vehicle CustomObject10 ( Vehicle Id )	Vehicle	Custom Objects 10	1-M-PRIMARY
Vehicle CustomObject11 ( Vehicle Id )	Vehicle	Custom Objects 11	1-M-PRIMARY
Vehicle CustomObject12 ( Vehicle Id )	Vehicle	Custom Objects 12	1-M-PRIMARY
Vehicle CustomObject13 ( Vehicle Id )	Vehicle	Custom Objects 13	1-M-PRIMARY
Vehicle CustomObject14 ( Vehicle Id )	Vehicle	Custom Objects 14	1-M-PRIMARY

Access Object Name	Access Object Name of Parent	Display Name (ENU)	Object Type
Vehicle CustomObject15 ( Vehicle Id )	Vehicle	Custom Objects 15	1-M-PRIMARY
Vehicle CustomObject4 ( Vehicle Id )	Vehicle	Custom Objects 04	1-M-PRIMARY
Vehicle CustomObject5 ( Vehicle Id )	Vehicle	Custom Objects 05	1-M-PRIMARY
Vehicle CustomObject6 ( Vehicle Id )	Vehicle	Custom Objects 06	1-M-PRIMARY
Vehicle CustomObject7 ( Vehicle Id )	Vehicle	Custom Objects 07	1-M-PRIMARY
Vehicle CustomObject8 ( Vehicle Id )	Vehicle	Custom Objects 08	1-M-PRIMARY
Vehicle CustomObject9 ( Vehicle Id )	Vehicle	Custom Objects 09	1-M-PRIMARY
Vehicle Fin Info	Vehicle	Financial Information	Child
Vehicle Sales Hist	Vehicle	Sales History	Child
Vehicle Serv Hist	Vehicle	Service Request History	Child
Vehicle Service Request ( Vehicle Id )	Vehicle	Service Requests	1-M-PRIMARY
VONDINS Portfolio/Audit Trail Item 2	Portfolio	Audit Trail	ReadOnly

## Access Levels and Corresponding Permission Codes in the XML File

This topic describes the access-profile permissions for access objects in Oracle CRM On Demand, and their corresponding permission codes in the XML file you are working with. For a given access level to an access object in Oracle CRM On Demand, use the following table to look up the permission code that appears in the XML file and cross-reference the permission code with the access level in the Oracle CRM On Demand user interface. The permission names shown in this table are the permission names that appear in the English-American (ENU) user interface. For more information about access levels, see the access profile information in *Oracle CRM On Demand Online Help*.

Object Type	Permissions (ENU)	Permission Codes
Top-Level Object	Read-Only	R



Object Type	Permissions (ENU)	Permission Codes
Top-Level Object	Read/Edit	RU
Top-Level Object	Read/Edit/Delete	RUD
Related Information Object Type: Child	Read/Create	CR
Related Information Object Type: Child	Read/Create/Edit	CRU
Related Information Object Type: Child	Read-Only	R
Related Information Object Type: Child	Read/Edit	RU
Related Information Object Type: Child	Read/Edit/Delete	RUD
Related Information Object Type: Child	Full	CRUD
Related Information Object Type: Child	No Access	No value
Related Information Object Type: 1-M (One-to-Many)	Full	CRUD
Related Information Object Type: 1-M (One-to-Many)	Read-Only	R
Related Information Object Type: 1-M (One-to-Many)	No Access	No value
Related Information Object Type: 1-M-Primary (One-to-Many Primary)	Full	CRUD
Related Information Object Type: 1-M-Primary (One-to-Many Primary)	Read-Only	R
Related Information Object Type: 1-M-Primary (One-to-Many Primary)	No Access	No value
Related Information Object Type: 1-M-Primary (One-to-Many Primary)	Inherit Primary	CRUDI
Related Information Object Type: M-M (Many-to-Many)	Read/Create	CR
Related Information Object Type: M-M (Many-to-Many)	Read-Only	R
Related Information Object Type: M-M (Many-to-Many)	Full	CRUD
Related Information Object Type: M-M (Many-to-Many)	No Access	No value

Object Type	Permissions (ENU)	Permission Codes
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Full	CRUD
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Read-Only	R
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	No Access	No value
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Add/Inherit Primary	CRUDAI
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Add/Remove/Inherit Primary	CRUDAXI
Related Information Object Type: M-M-Primary (Many-to-Many Primary)	Inherit Primary	CRUDI
Related Information Object Type: Read-Only	Read-Only	R
Related Information Object Type: Read-Only	No Access	No value

# 39 Classic and Modern Theme Icons

## Classic and Modern Theme Icons












This appendix contains the following topics:

- *Classic Theme Icons*
- *Modern Theme Icons*

## Classic Theme Icons




This topic lists the icons used for customized record types and Detail page Web applets in the corresponding XML files.

The following table lists the classic theme icons and their file names as provided with Oracle CRM On Demand.

Icon Name	Icon
1006.gif	
1033.gif	
1048.gif	
1056.gif	
1801.gif	
1824.gif	
1826.gif	
16_account.png	
16_accountPDQPinned.png	
16_accounts.png	
16_account_contact.png	

Icon Name	Icon
16_addresses.png	
16_alerts_grid.png	
16_analytics_grid.png	
16_aroundme_grid.png	
16_bestCallTime.png	
16_calendar_grid.png	
16_callHistory.png	
16_callProductDetails.png	
16_contacts.png	
16_contacts_grid.png	
16_generic_grid.png	
16_gift.png	
16_launchDetailer.png	
16_launchPresentation.png	
16_leads_grid.png	
16_licenses.png	
16_opportunities_grid.png	
16_presentationDetails.png	
16_relationships.png	
16_sales_accounts_grid.png	

Icon Name	Icon
16_sample.png	
16_samples.png	
16_tasks_grid.png	
application_form.png	
application_view_tile.png	
arrow_divide.png	
asterisk_orange.png	
attach.png	
award_star_gold_1.png	
bell.png	
box.png	
brick.png	
bug.png	
building.png	
cake.png	
camera.png	
campaign_status.gif	
car.png	
cart.png	
catalog_status.gif	













Icon Name	Icon
certificaterequired.gif	
chart_bar.png	
chart_organisation.png	
chart_pie.png	
clock.png	
cog.png	
coins.png	
commentind_active.gif	
controller.png	
cup.png	
derived_bidi_status.gif	
disconnect.png	
drive_network.png	
email.png	
eye.png	
feed_icon.gif	
female.png	
film.png	
flag_green.png	
heart.png	

Icon Name	Icon
house.png	
HR_IMAGE5_85.gif	
HR_IMAGE5_184.gif	
HR_IMAGE5_221.gif	
HR_IMAGE5_249.gif	
HR_IMAGE5_593.gif	
HR_IMAGE5_678.gif	
icon_custtab.gif	
instore_status.gif	
ipod.png	
key.png	
lightbulb.png	
lightning.png	
locked_status.gif	
male.png	
map.png	
money.png	
money_dollar.png	
money_euro.png	
mouse.png	

Icon Name	Icon
newupdateditem_status.gif	
onvacation_status.gif	
orders_icon.gif	
package_green.png	
paintcan.png	
palette.png	
phone.png	
photo.png	
plugin.png	
primary_status.gif	
printer.png	
quotes_icon.gif	
rainbow.png	
register_status.gif	
rosette.png	
rte_image_enabled.gif	
rte_paste_enabled.gif	
ruby.png	
shield.png	
sound.png	





















Icon Name	Icon
sport_football.png	
sport_soccer.png	
telephone.png	
television.png	
timeexpires_status.gif	
transmit.png	
tree_alert.gif	
tree_collateral.gif	
tree_component.gif	
tree_configextension.gif	
tree_contentobject.gif	
tree_database.gif	
tree_forum.gif	
tree_grades.gif	
tree_graph.gif	
tree_library.gif	
tree_messages.gif	
tree_property.gif	
tree_server.gif	
tree_servicerequest.gif	
















Icon Name	Icon
tree_sharedobjects.gif	
tree_site.gif	
tree_testobject.gif	
tree_workflow.gif	
tux.png	
user_gray.png	
user_orange.png	
wand.png	
weather_sun.png	
webpage_status.gif	
world.png	
zoom.png	
















## Modern Theme Icons
















The following information lists the modern theme icons and their file names as provided with Oracle CRM On Demand.
















Icon Name	Icon
mod_account_25.png	
mod_accountpartners_25.png	
mod_accreditation_25.png	
















Icon Name	Icon
mod_accreditationrequest_25.png	
mod_address_25.png	
mod_allocation_25.png	
mod_application_25.png	
mod_assets_25.png	
mod_attachment_25.png	
mod_availableproductsfordetailing_25.png	
mod_blockedproduct_25.png	
mod_books_25.png	
mod_brokerprofile_25.png	
mod_businessplan_25.png	
mod_calendar_25.png	
mod_callactivityhistory_25.png	
mod_calls_25.png	
mod_campaign_25.png	

Icon Name	Icon
mod_category_25.png	
mod_certification_25.png	
mod_certificationrequest_25.png	
mod_claim_25.png	
mod_communications_25.png	
mod_competitors_25.png	
mod_contact_25.png	
mod_contactbesttime_25.png	
mod_contactstatelicense_25.png	
mod_course_25.png	
mod_courseenrollment_25.png	
mod_coverage_25.png	
mod_customobject_25.png	
mod_customwebtab_25.png	
mod_damage_25.png	
















Icon Name	Icon
mod_dashboard_25.png	
mod_dealer_25.png	
mod_dealregistration_25.png	
mod_dealregistrationproductrevenue_25.png	
mod_directory_25.png	
mod_division_25.png	
mod_event_25.png	
mod_exam_25.png	
mod_exam_registration_25.png	
mod_financialaccount_25.png	
mod_financialaccountholder_25.png	
mod_financialaccountholding_25.png	
mod_financialplan_25.png	
mod_financialproduct_25.png	
mod_financialtransaction_25.png	
















Icon Name	Icon
mod_forecast_25.png	
mod_fund_25.png	
mod_fundcredit_25.png	
mod_funddebit_25.png	
mod_fundrequest_25.png	
mod_group_25.png	
mod_hash_25.png	
mod_hcpcontactallocation_25.png	
mod_home_25.png	
mod_household_25.png	
mod_insuranceproperty_25.png	
mod_interests_25.png	
mod_inventoryauditreport_25.png	
mod_inventoryperiod_25.png	
mod_involvedparty_25.png	






Icon Name	Icon
mod_lead_25.png	
mod_makes_25.png	
mod_map_25.png	
mod_mdrequest_25.png	
mod_messageresponse_25.png	
mod_messagingplan_25.png	
mod_messagingplanitem_25.png	
mod_messagingplanitemrelations_25.png	
mod_modificationtracking_25.png	
mod_notes_25.png	
mod_objective_25.png	
mod_opportunity_25.png	
mod_oraclesocialnetwork_25.png	
mod_order_25.png	
mod_orderitem_25.png	

Icon Name	Icon
mod_partnrmembers_25.png	
mod_partnertype_25.png	
mod_patient_25.png	
mod_period_25.png	
mod_personalinfo_25.png	
mod_planaccount_25.png	
mod_planopportunity_25.png	
mod_plans_25.png	
mod_policy_25.png	
mod_policyholder_25.png	
mod_portfolio_25.png	
mod_pricelist_25.png	
mod_pricelistlineitem_25.png	
mod_product_25.png	
mod_productindication_25.png	



Icon Name	Icon
mod_products_detailed_25.png	
mod_referrals_25.png	
mod_relatedaccreditation_25.png	
mod_relatedcertification_25.png	
mod_relatedcourse_25.png	
mod_relatedcourses_25.png	
mod_relatedexam_25.png	
mod_relatedsolutions_25.png	
mod_relationship_25.png	
mod_reports_25.png	
mod_revenues_25.png	
mod_saleshistory_25.png	
mod_saleshours_25.png	
mod_sampledisclaimer_25.png	
mod_sampleinventory_25.png	

Icon Name	Icon
mod_samplelot_25.png	
mod_samplerequest_25.png	
mod_samplerequestitem_25.png	
mod_samplesdropped_25.png	
mod_sampletransaction_25.png	
mod_servicehistory_25.png	
mod_servicehours_25.png	
mod_servicerequest_25.png	
mod_signature_25.png	
mod_social_25.png	
mod_socialprofile_25.png	
mod_solution_25.png	
mod_specialpricingproduct_25.png	
mod_specialpricingrequest_25.png	
mod_team_25.png	

Icon Name	Icon
mod_territory_25.png	
mod_transactionitem_25.png	
mod_unknown_25.png	
mod_user_25.png	
mod_vehicle_25.png	



# 40 System Names for Record Types

## System Names for Record Types

This appendix contains the following topic:

- *System Names for Record Types*

## System Names for Record Types

The following table lists the system names for record types (objects) and their corresponding display names as they appear in the English-American (ENU) user interface in Oracle CRM On Demand.

Object System Name	Display Name (ENU)
Account	Account
Account Book	Account Book
Account Contact	Account Contact
Account Team	Account Team
AccountAddress	Account Address
AccountCall	Account Call
AccountCompetitor	Account Competitor
AccountEvent	Account Event
AccountPartner	Account Partner
AccountRelationship	Account Relationship
AccountRevenue	Account Revenue
Accreditation	Accreditation
Accreditation Book	Accreditation Book

Object System Name	Display Name (ENU)
AccreditationAttachment	Accreditation Attachment
AccreditationCertification	Accreditation Certification
AccreditationProduct	Accreditation Product
AccreditationProductCategory	Accreditation Product Product Category
AccreditationRelationship	Related Accreditation
AccreditationRequest	Accreditation Request
AccreditationSolution	Accreditation Solution
AccreditationTeam	Accreditation Team
Activity	Activity
Activity Book	Book
Address	Address Location
AdminDelegatedFromUser	Delegated From Users
AllotmentUsageData	Allotment Usage
Analytics	Analytics
Application	Application
Application Book	Application Book
ApplicationAttachment	Application Attachment
ApplicationObject	Application Object
ApplicationTeam	Application Team
Appointment	Appointment
Asset	Asset

Object System Name	Display Name (ENU)
Attendee Call	Attendee Call
Audit Trail	Audit Trail
Auto Vehicle Book	Vehicle Book
AutomateTask	Activity
BlockedProduct	Blocked Product
Book	Book
Book User	Book Users
BrokerProfile	Broker Profile
CalendarActivityTheme	Calendar Activities
Call MessagePlanVBC	Available Message Plan
Call ProdDetail	Call Product Detail
Call ProdDetailVBC	Available Product Detailed
Call PromItemDrop	Call Promotional Items Dropped
Call PromItemDropVBC	Available Promotional Item Dropped
Call SampDrop	Call Sample Dropped
Call SampDropVBC	Available Sample Dropped
CallActivityHistory	Call Activity History  <b>Note:</b> Field management configurations for the Call Activity History record type can be updated through the user interface only. You can use the Oracle Migration Tool On Demand client to read field management configurations for this record type, but you cannot use the Oracle Migration Tool On Demand client to update field management configurations for this record type.
CallProdDetail_MsgPlanItem	Call Product Detail Messaging Plan Item

Object System Name	Display Name (ENU)
CallProdDetail_MsgPlnRel	Call Product Detail Messaging Plan Item Relations
CallProdDetail_MsgRsp	Call Product Detail Message Response
Campaign	Campaign
Campaign Book	Campaign Book
Category	Product Category
Certification	Certification
Certification Book	Certification Book
CertificationAttachment	Certification Attachment
CertificationCourse	Certification Course
CertificationExam	Certification Exam
CertificationProduct	Certification Product
CertificationProductCategory	Certification Product Product Category
CertificationRelationship	Related Certification
CertificationRequest	Certification Request
CertificationSolution	Certification Solution
CertificationTeam	Certification Team
Channel Partner	Dealer
Channel Partner Territory	Dealer Territory
Claim	Claim
ClientSideExt	Client Side Extension
CODActChatDetail	Communications Chat



Object System Name	Display Name (ENU)
CODActEmailDetail	Communications Email
CODActVMDetail	Communications Voicemail
CODActVoiceDetail	Communications Call
CODWrapUp	Communications Wrap Up
Company	Company
Contact	Contact
Contact Book	Contact Book
Contact Call	Contact Call
Contact Team	Contact Team
ContactAddress	Contact Address
ContactBestTimes	Contact Best Time
ContactCampaign	Campaign Recipients
ContactInterest	Contact Interests
ContactRelationship	Contact Relationship
ContactRevenue	Contact Revenue
Course	Course
Course Book	Course Book
CourseAttachment	Course Attachment
CourseCategory	Course Product Product Category
CourseEnrollment	Course Enrollment
CourseExam	Course Exam

Object System Name	Display Name (ENU)
CoursePartner	Course Partner
CourseProduct	Course Product
CourseRelationship	Related Course
CourseSolution	Course Solution
CourseTeam	Course Team
Coverage	Coverage
CRMDesktopLocInstaller	Localization
CRMDesktopMetadataPackage	Package
CRMOD_LS_Allocation	Allocation
CRMOD_LS_Allocation Book	Allocation Book
CRMOD_LS_ContactLicenses	Contact State License
CRMOD_LS_MessagingPlan	Messaging Plan
CRMOD_LS_MessagingPlan Book	Messaging Plan Book
CRMOD_LS_MsgPlanItem	Messaging Plan Item
CRMOD_LS_MsgPlnRel	Messaging Plan Item Relations
CRMOD_LS_Period	Period
CRMOD_LS_TransactionItems	Transaction Item
CRMOD_LS_Transactions	Sample Transaction
CRMOD_LS_Transactions Book	Sample Transaction Book
CRMODLS_BPL_ACNT	Plan Account
CRMODLS_BPL_CNTCT	Plan Contact

Object System Name	Display Name (ENU)
CRMODLS_BusinessPlan	Business Plan
CRMODLS_BusinessPlan Book	Business Plan Book
CRMODLS_BusinessPlan_ATTACHMENT	Business Plan Attachment
CRMODLS_BusinessPlanTeam	Business Plan Team
CRMODLS_InventoryAuditReport	Inventory Audit Report
CRMODLS_InventoryAuditReport Book	Inventory Audit Report Book
CRMODLS_InventoryPeriod	Inventory Period
CRMODLS_InventoryPeriod Book	Inventory Period Book
CRMODLS_ModificationLog	Modification Tracking
CRMODLS_OBJECTIVE	Objective
CRMODLS_OBJECTIVE Book	Objective Book
CRMODLS_OBJECTIVE_ATTACHMENT	Objective Attachment
CRMODLS_OBJECTIVETeam	Objective Team
CRMODLS_PCD_MSGRSP	Message Response
CRMODLS_PlanOpportunities	Plan Opportunity
CRMODLS_RELDISC	Related Disclaimer
CRMODLS_SampleInventory	Sample Inventory
CRMODLS_SampleLot	Sample Lot
CRMODLS_SampleLot Book	Sample Lot Book
CRMODLS_Signature	Signature
CRMODLS_SIGNDISC	Sample Disclaimer

Object System Name	Display Name (ENU)
CustObj1 Team	Custom Object 01 Team
CustObj2 Team	Custom Object 02 Team
CustObj3 Team	Custom Object 03 Team
Custom Object 1	Custom Object 01
Custom Object 1 Book	Custom Object 01 Book
Custom Object 2	Custom Object 02
Custom Object 2 Book	Custom Object 02 Book
Custom Object 3	Custom Object 03
Custom Object 3 Book	Custom Object 03 Book
CustomIcons	Icon
CustomObject10	Custom Object 10
CustomObject10 Book	Custom Object 10 Book
CustomObject10Team	Custom Object 10 Team
CustomObject11	Custom Object 11
CustomObject11 Book	Custom Object 11 Book
CustomObject11Team	Custom Object 11 Team
CustomObject12	Custom Object 12
CustomObject12 Book	Custom Object 12 Book
CustomObject12Team	Custom Object 12 Team
CustomObject13	Custom Object 13
CustomObject13 Book	Custom Object 13 Book

Object System Name	Display Name (ENU)
CustomObject13Team	Custom Object 13 Team
CustomObject14	Custom Object 14
CustomObject14 Book	Custom Object 14 Book
CustomObject14Team	Custom Object 14 Team
CustomObject15	Custom Object 15
CustomObject15 Book	Custom Object 15 Book
CustomObject15Team	Custom Object 15 Team
CustomObject16	Custom Object 16
CustomObject16Team	Custom Object 16 Team
CustomObject17	Custom Object 17
CustomObject17Team	Custom Object 17 Team
CustomObject18	Custom Object 18
CustomObject18Team	Custom Object 18 Team
CustomObject19	Custom Object 19
CustomObject19Team	Custom Object 19 Team
CustomObject20	Custom Object 20
CustomObject20Team	Custom Object 20 Team
CustomObject21	Custom Object 21
CustomObject21Team	Custom Object 21 Team
CustomObject22	Custom Object 22
CustomObject22Team	Custom Object 22 Team

Object System Name	Display Name (ENU)
CustomObject23	Custom Object 23
CustomObject23Team	Custom Object 23 Team
CustomObject24	Custom Object 24
CustomObject24Team	Custom Object 24 Team
CustomObject25	Custom Object 25
CustomObject25Team	Custom Object 25 Team
CustomObject26	Custom Object 26
CustomObject26Team	Custom Object 26 Team
CustomObject27	Custom Object 27
CustomObject27Team	Custom Object 27 Team
CustomObject28	Custom Object 28
CustomObject28Team	Custom Object 29 Team
CustomObject29	Custom Object 29
CustomObject29Team	Custom Object 29 Team
CustomObject30	Custom Object 30
CustomObject30Team	Custom Object 30 Team
CustomObject31	Custom Object 31
CustomObject31Team	Custom Object 31 Team
CustomObject32	Custom Object 32
CustomObject32Team	Custom Object 32 Team
CustomObject33	Custom Object 33

Object System Name	Display Name (ENU)
CustomObject33Team	Custom Object 33 Team
CustomObject34	Custom Object 34
CustomObject34Team	Custom Object 34 Team
CustomObject35	Custom Object 35
CustomObject35Team	Custom Object 35 Team
CustomObject36	Custom Object 36
CustomObject36Team	Custom Object 36 Team
CustomObject37	Custom Object 37
CustomObject37Team	Custom Object 37 Team
CustomObject38	Custom Object 38
CustomObject38Team	Custom Object 38 Team
CustomObject39	Custom Object 39
CustomObject39Team	Custom Object 39 Team
CustomObject4	Custom Object 04
CustomObject4 Book	Custom Object 04 Book
CustomObject40	Custom Object 40
CustomObject40Team	Custom Object 40 Team
CustomObject4Team	Custom Object 04 Team
CustomObject5	Custom Object 05
CustomObject5 Book	Custom Object 05 Book
CustomObject5Team	Custom Object 05 Team

Object System Name	Display Name (ENU)
CustomObject6	Custom Object 06
CustomObject6 Book	Custom Object 06 Book
CustomObject6Team	Custom Object 06 Team
CustomObject7	Custom Object 07
CustomObject7 Book	Custom Object 07 Book
CustomObject7Team	Custom Object 07 Team
CustomObject8	Custom Object 08
CustomObject8 Book	Custom Object 08 Book
CustomObject8Team	Custom Object 08 Team
CustomObject9	Custom Object 09
CustomObject9 Book	Custom Object 09 Book
CustomObject9Team	Custom Object 09 Team
Damage	Damage
Dashboard	Dashboard
Dealer Book	Book
DealerAddress	Dealer Address
DealRegistration	Deal Registration
DealRegistration Book	Deal Registration Book
DealRegistrationRevenue	Deal Registration Product Revenue
DealRegistrationTeam	Deal Registration Team
Delegated User	Delegated To Users



Object System Name	Display Name (ENU)
DelegatedFrom User	Delegated From Users
Division	Division
Exam	Exam
Exam Book	Exam Book
ExamAttachment	Exam Attachment
ExamCategory	Exam Product Product Category
ExamPartner	Exam Partner
ExamProduct	Exam Product
ExamRegistration	Exam Registration
ExamRelationship	Related Exam
ExamSolution	Exam Solution
ExamTeam	Exam Team
FinancialAccount	Financial Account
FinancialAccount Book	Financial Account Book
FinancialAccountHolder	Financial Account Holder
FinancialAccountHolding	Financial Account Holding
FinancialPlan	Financial Plan
FinancialPlan Book	Financial Plan Book
FinancialProduct	Financial Product
FinancialTransaction	Financial Transaction
Forecast	Forecast

Object System Name	Display Name (ENU)
Fund	Fund
Fund Book	Fund Book
Fund Item	Fund Item
Fund Request	Fund Request
FundPartner	Fund Membership
GlobalHeaderCustomIcons	Global Header Icon
GlobalHeaderMenu	Global Header Icon
Group	Group
HCPCContactAllocation	HCP Contact Allocation
HCPCContactAllocation Book	HCP Contact Allocation Book
Household	Household
Household Book	Book
Household Contact	Household Contact
HouseholdTeam	Household Team
InsuranceProperty	Insurance Property
InvolvedParty	Involved Party
Lead	Lead
Lead Book	Lead Book
LeadEvent	Lead Event
LeadPartner	Lead Partner
LeadTeam	Lead Team

Object System Name	Display Name (ENU)
MDFRequest	MDF Request
MDFRequest Book	MDF Request Book
MDFRequestAttachment	MDF Request Attachment
MDFRequestTeam	MDF Request Team
MedEdEvent	Event
MedEdInvitee	Invitee
Note	Note
ObjectIconSet	Icon Set
Opportunity	Opportunity
Opportunity Book	Opportunity Book
Opportunity Contact Role	Opportunity Contact Role
Opportunity Team	Opportunity Team
OpportunityCompetitor	Opportunity Competitor
OpportunityEvent	Opportunity Event
OpportunityPartner	Opportunity Partner
OpportunityRevenue	Opportunity Product Revenue
OracleSocialNetwork	Social
Order	Order
Order Book	Order Book
OrderItem	Order Item
OrderTeam	Order Team

Object System Name	Display Name (ENU)
Partner	Partner
Partner Book	Partner Book
PartnerAccount	Partner Account
PartnerAddress	Partner Address
PartnerCampaign	Partner Campaign
PartnerOpportunity	Partner Opportunity
PartnerPlan	Partner Plan
PartnerProgram	Program Membership
PartnerRelationship	Partner Relationship
PartnerRole	Partner User Role
PartnerTeam	Partner Team
PartnerType	Partner Type
Patient	Patient
PatientAsset	Patient Asset
PatientContact	Patient Contact
PatientTeam	Patient Team
Pharma ME Event Book	Event Book
Pharma ME EventTeam	Event Team
PickValueGroup	Picklist Value Group
Policy	Policy
Policy Book	Policy Book

Object System Name	Display Name (ENU)
PolicyAttachment	Policy Attachment
PolicyHolder	Policy Holder
Portfolio	Portfolio
PortfolioContact	Portfolio Owner
PortfolioOwners	Contact Portfolio
PortfolioTeam	Portfolio Team
PriceList	Price List
PriceListLineItem	Price List Line Item
PRMDelegatedAdmin	User Partner Admin
Process	Process
ProcessFieldSetup	Field Setup
ProcessPrimaryValue	Primary Value
ProcessRelatedAccess	Related Access Control
ProcessStep	Transition State
Product	Product
ProductIndication	Product Indication
Program	Partner Program
Program Book	Program Book
ProgramAttachment	Partner Program Attachment
ProgramPartner	Program Membership
Quote	Quote

Object System Name	Display Name (ENU)
RecordUtilization	Record Utilization
Revenue	Revenue
Sales Assessment	Assessment
Sales Assessment Template	Assessment
SampleRequest	Sample Request
SampleRequest Book	Sample Request Book
SampleRequestItem	Sample Request Item
SampleRequestTeam	Sample Request Team
Service Request	Service Request
Service RequestTeam	Service Request Team
ServiceQuota	Service Allotment
SharedAddress	Address
SmartCall	Smart Call
SocialMedia	Social Media
SocialProfile	Social Profile
Solution	Solution
Solution Book	Solution Book
SPPartner	Partner Special Pricing Request
SPRequest	Special Pricing Request
SPRequest Book	Special Pricing Request Book
SPRequestAttachment	Special Pricing Request Attachment

Object System Name	Display Name (ENU)
SPRequestLineItem	Special Pricing Product
SPRequestTeam	Special Pricing Request Team
Task	Task
Territory	Territory
Theme	Theme
User	User
UserAdmin	User Admin
UserDivision	User Division
UserOwner	User Owner
Vehicle	Vehicle
Vehicle FinInfo	Vehicle Financial Information
Vehicle SalesHist	Vehicle Sales History
Vehicle ServHist	Vehicle Service History





# 41 Homepage Section Layout Mapping

## Homepage Section Layout Mapping

This appendix contains the following topic:

- *Homepage Section Layout Mapping*

## Homepage Section Layout Mapping

The following table shows the names of the homepage section layouts in the homepage XML files and their corresponding display names in the user interface for various Oracle CRM On Demand objects. The display names shown in this table are the display names that appear in the English-American (ENU) user interface of Oracle CRM On Demand.

**Note:** The Oracle Migration Tool On Demand client does not support homepage layout migration for the following objects: Forecast, Daily Calendar, and Analytics.

Object Name	Homepage Section Layout Name	Display Name (ENU)
Account	Account Analysis Report	Account Analysis
Account	AccountsRecentlyViewedList	My Recently Viewed Accounts
Account	All Recently Created Accounts	Recently Created Accounts
Account	All Recently Modified Accounts	Recently Modified Accounts
Account	AllOpenAccountTasks	Account Tasks
Account	HomepageAccountList	Account Lists
Account	MyCurrentAccountTasks	My Current Account Related Tasks
Account	MyOpenAccountTasks	My Open Account Related Tasks
Account	MyRecentlyCreatedAccounts	My Recently Created Accounts
Account	MyRecentlyModifiedAccounts	My Recently Modified Accounts

Object Name	Homepage Section Layout Name	Display Name (ENU)
Accreditation	Accreditation.AllList	Accreditation Lists
Accreditation	Accreditation.AllRecentlyCreated	Recently Created Accreditations
Accreditation	Accreditation.AllRecentlyIntroduced	Recently Introduced Accreditations
Accreditation	Accreditation.AllRecentlyModified	Recently Modified Accreditations
Accreditation	Accreditation.AllRetiring	Retiring Accreditations
Accreditation	Accreditation.MyList	My Accreditations
Accreditation	Accreditation.MyRecentlyCreated	My Recently Created Accreditations
Accreditation	Accreditation.MyRecentlyModified	My Recently Modified Accreditations
Accreditation	Accreditation.MyRecentlyViewedListLayout	My Recently Viewed Accreditations
Application	Application.AllApplication	All Applications
Application	Application.AllApproved	All Approved Applications
Application	Application.AllList	Application Lists
Application	Application.AllRejected	All Rejected Applications
Application	Application.AllSubmitted	All Submitted Applications
Application	Application.MyApplication	My Applications
Application	Application.MyRecentlyCreated	My Recently Created Applications
Application	Application.MyRecentlyModified	My Recently Modified Applications
Asset	Asset.AllList	Asset Lists
Asset	Asset.AllRecentlyModified	Recently Modified Assets
BlockedProduct	BlockedProduct.AllList	Blocked Product Lists
BlockedProduct	BlockedProduct.AllRecentlyModified	Recently Modified Blocked Products

Object Name	Homepage Section Layout Name	Display Name (ENU)
BrokerProfile	BrokerProfile.AllList	Broker Profile Lists
BrokerProfile	BrokerProfile.AllNatBrokers	All National Broker Profiles
BrokerProfile	BrokerProfile.AllRecentlyModified	Recently Modified Broker Profiles
BrokerProfile	BrokerProfile.MyBrokerProfiles	My Broker Profiles
Campaign	Active Campaign Status Report	Active Campaign Status
Campaign	All Recently Created Campaigns	Recently Created Campaigns
Campaign	All Recently Modified Campaigns	Recently Modified Campaigns
Campaign	AllOpenCampaignTasks	Campaign Tasks
Campaign	CampaignList	Campaign Lists
Campaign	CampaignRecentlyViewedList	My Recently Viewed Campaigns
Campaign	Homepage Active Campaigns	Active Campaigns
Campaign	MyCurrentCampaignTasks	My Current Campaign Related Tasks
Campaign	MyOpenCampaignTasks	My Open Campaign Related Tasks
Campaign	MyRecentlyCreatedCampaigns	My Recently Created Campaigns
Campaign	MyRecentlyModifiedCampaigns	My Recently Modified Campaigns
Certification	Certification.AllList	Certification Lists
Certification	Certification.AllRecentlyCreated	Recently Created Certifications
Certification	Certification.AllRecentlyIntroduced	Recently Introduced Certifications
Certification	Certification.AllRecentlyModified	Recently Modified Certifications
Certification	Certification.AllRetiring	Retiring Certifications
Certification	Certification.MyList	My Certifications

Object Name	Homepage Section Layout Name	Display Name (ENU)
Certification	Certification.MyRecentlyCreated	My Recently Created Certifications
Certification	Certification.MyRecentlyModified	My Recently Modified Certifications
Certification	Certification.MyRecentlyViewedListLayout	My Recently Viewed Certifications
Channel Partner	All Recently Created Dealers	Recently Created Dealers
Channel Partner	All Recently Modified Dealers	Recently Modified Dealers
Channel Partner	DealerList	Dealer Lists
Channel Partner	DealersRecentlyViewedList	My Recently Viewed Dealers
Channel Partner	My Recently Created Dealers	My Recently Created Dealers
Channel Partner	My Recently Modified Dealers	My Recently Modified Dealers
Channel Partner	OptyList	Dealer-Related Opportunities
Claim	Claim.AllList	Claim Lists
Claim	Claim.AllRecentlyModified	Recently Modified Claims
Contact	All Recently Created Contacts	Recently Created Contacts
Contact	All Recently Modified Contacts	Recently Modified Contacts
Contact	AllOpenContactTasks	Contact Tasks
Contact	Contact Analysis By Account Report	Contact Analysis By Account
Contact	ContactsRecentlyViewedList	My Recently Viewed Contacts
Contact	FavoriteContactsList	Favorite Contacts
Contact	HomepageContactList	Contact Lists
Contact	MyCurrentContactTasks	My Current Contact Related Tasks
Contact	MyOpenContactTasks	My Open Contact Related Tasks

Object Name	Homepage Section Layout Name	Display Name (ENU)
Contact	MyRecentlyCreatedContacts	My Recently Created Contacts
Contact	MyRecentlyModifiedContacts	My Recently Modified Contacts
Course	Course.AllList	Course Lists
Course	Course.AllRecentlyCreated	Recently Created Courses
Course	Course.AllRecentlyIntroduced	Recently Introduced Courses
Course	Course.AllRecentlyModified	Recently Modified Courses
Course	Course.AllRetiring	Retiring Courses
Course	Course.MyList	My Courses
Course	Course.MyRecentlyCreated	My Recently Created Courses
Course	Course.MyRecentlyModified	My Recently Modified Courses
Course	Course.MyRecentlyViewedListLayout	My Recently Viewed Courses
Coverage	Coverage.AllList	Coverage Lists
Coverage	Coverage.AllRecentlyModified	Recently Modified Coverages
CRMOD_LS_Allocation	CRMOD_LS_Allocation.AllList	Allocation Lists
CRMOD_LS_Allocation	CRMOD_LS_Allocation.AllRecentlyModified	Recently Modified Allocations
CRMOD_LS_Contact Licenses	CRMOD_LS_ContactLicenses.AllList	Contact State License Lists
CRMOD_LS_Contact Licenses	CRMOD_LS_ContactLicenses.AllRecentlyModified	Recently Modified Contact State Licenses
CRMOD_LS_Messaging Plan	CRMOD_LS_MessagingPlan.AllList	Messaging Plan Lists
CRMOD_LS_Messaging Plan	CRMOD_LS_MessagingPlan.AllRecentlyModified	Recently Modified Messaging Plans
CRMOD_LS_MsgPlanItem	CRMOD_LS_MsgPlanItem.AllList	Messaging Plan Item Lists

Object Name	Homepage Section Layout Name	Display Name (ENU)
CRMOD_LS_MsgPlanItem	CRMOD_LS_MsgPlanItem.AllRecentlyModified	Recently Modified Messaging Plan Items
CRMOD_LS_MsgPlnRel	CRMOD_LS_MsgPlnRel.AllList	Messaging Plan Item Relations Lists
CRMOD_LS_MsgPlnRel	CRMOD_LS_MsgPlnRel.AllRecentlyModified	Recently Modified Messaging Plan Item Relations
CRMOD_LS_Transactions	CRMOD_LS_Transactions.AllList	Sample Transaction Lists
CRMOD_LS_Transactions	CRMOD_LS_Transactions.AllRecentlyModified	Recently Modified Sample Transactions
CRMODLS_BPL_ACNT	CRMODLS_BPL_ACNT.AllList	Plan Account Lists
CRMODLS_BPL_ACNT	CRMODLS_BPL_ACNT.AllRecentlyModified	Recently Modified Plan Accounts
CRMODLS_BPL_CNTCT	CRMODLS_BPL_CNTCT.AllList	Plan Contact Lists
CRMODLS_BPL_CNTCT	CRMODLS_BPL_CNTCT.AllRecentlyModified	Recently Modified Plan Contacts
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan.AllList	Business Plan Lists
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan.AllRecentlyModified	Recently Modified Business Plans
CRMODLS_Inventory AuditReport	CRMODLS_InventoryAuditReport.AllList	Inventory Audit Report Lists
CRMODLS_Inventory AuditReport	CRMODLS_InventoryAuditReport.AllRecentlyModified	Recently Modified Inventory Audit Reports
CRMODLS_InventoryPeriod	CRMODLS_InventoryPeriod.AllList	Inventory Period Lists
CRMODLS_InventoryPeriod	CRMODLS_InventoryPeriod.AllRecentlyModified	Recently Modified Inventory Periods
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE.AllList	Objective Lists
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE.AllRecentlyModified	Recently Modified Objectives
CRMODLS_Plan Opportunities	CRMODLS_PlanOpportunities.AllList	Plan Opportunity Lists

Object Name	Homepage Section Layout Name	Display Name (ENU)
CRMODLS_Plan Opportunities	CRMODLS_PlanOpportunities.AllRecentlyModified	Recently Modified Plan Opportunities
CRMODLS_SampleLot	CRMODLS_SampleLot.AllList	Sample Lot Lists
CRMODLS_SampleLot	CRMODLS_SampleLot.AllRecentlyModified	Recently Modified Sample Lots
CRMODLS_SIGNDISC	CRMODLS_SIGNDISC.AllList	Sample Disclaimer Lists
CRMODLS_SIGNDISC	CRMODLS_SIGNDISC.AllRecentlyModified	Recently Modified Sample Disclaimers
Custom Object 1	All Recently Created CustObjs1	Recently Created Custom Objects 01
Custom Object 1	All Recently Modified CustObjs1	Recently Modified Custom Objects 01
Custom Object 1	CO1RecentlyViewedList	My Recently Viewed Custom Objects 01
Custom Object 1	CustObj1List	Custom Object 01 Lists
Custom Object 1	My Recently Created CustObjs1	My Recently Created Custom Objects 01
Custom Object 1	My Recently Modified CustObjs1	My Recently Modified Custom Objects 01
Custom Object 2	All Recently Created CustObjs2	Recently Created Custom Objects 02
Custom Object 2	All Recently Modified CustObjs2	Recently Modified Custom Objects 02
Custom Object 2	CO2RecentlyViewedList	My Recently Viewed Custom Objects 02
Custom Object 2	CustObj2List	Custom Object 02 Lists
Custom Object 2	My Recently Created CustObjs2	My Recently Created Custom Objects 02
Custom Object 2	My Recently Modified CustObjs2	My Recently Modified Custom Objects 02
Custom Object 3	All Recently Created CustObjs3	Recently Created Custom Objects 03
Custom Object 3	All Recently Modified CustObjs3	Recently Modified Custom Objects 03
Custom Object 3	CO3RecentlyViewedList	My Recently Viewed Custom Objects 03
Custom Object 3	CustObj3List	Custom Object 03 Lists

Object Name	Homepage Section Layout Name	Display Name (ENU)
Custom Object 3	My Recently Created CustObjs3	My Recently Created Custom Objects 03
Custom Object 3	My Recently Modified CustObjs3	My Recently Modified Custom Objects 03
CustomObject10	CustomObject10.AllList	Custom Object 10 Lists
CustomObject10	CustomObject10.AllRecentlyModified	Recently Modified Custom Objects 10
CustomObject11	CustomObject11.AllList	Custom Object 11 Lists
CustomObject11	CustomObject11.AllRecentlyModified	Recently Modified Custom Objects 11
CustomObject12	CustomObject12.AllList	Custom Object 12 Lists
CustomObject12	CustomObject12.AllRecentlyModified	Recently Modified Custom Objects 12
CustomObject13	CustomObject13.AllList	Custom Object 13 Lists
CustomObject13	CustomObject13.AllRecentlyModified	Recently Modified Custom Objects 13
CustomObject14	CustomObject14.AllList	Custom Object 14 Lists
CustomObject14	CustomObject14.AllRecentlyModified	Recently Modified Custom Objects 14
CustomObject15	CustomObject15.AllList	Custom Object 15 Lists
CustomObject15	CustomObject15.AllRecentlyModified	Recently Modified Custom Objects 15
CustomObject4	CustomObject4.AllList	Custom Object 04 Lists
CustomObject4	CustomObject4.AllRecentlyModified	Recently Modified Custom Objects 04
CustomObject5	CustomObject5.AllList	Custom Object 05 Lists
CustomObject5	CustomObject5.AllRecentlyModified	Recently Modified Custom Objects 05
CustomObject6	CustomObject6.AllList	Custom Object 06 Lists
CustomObject6	CustomObject6.AllRecentlyModified	Recently Modified Custom Objects 06
CustomObject7	CustomObject7.AllList	Custom Object 07 Lists



Object Name	Homepage Section Layout Name	Display Name (ENU)
CustomObject7	CustomObject7.AllRecentlyModified	Recently Modified Custom Objects 07
CustomObject8	CustomObject8.AllList	Custom Object 08 Lists
CustomObject8	CustomObject8.AllRecentlyModified	Recently Modified Custom Objects 08
CustomObject9	CustomObject9.AllList	Custom Object 09 Lists
CustomObject9	CustomObject9.AllRecentlyModified	Recently Modified Custom Objects 09
Damage	Damage.AllList	Damage Lists
Damage	Damage.AllRecentlyModified	Recently Modified Damages
DealRegistration	DealRegistration.AllList	Deal Registration Lists
DealRegistration	DealRegistration.AllRecentlyModified	Recently Modified Deal Registrations
DealRegistration	DealRegistration.ApprovedDRPDQLayout	Active Deal Registrations
DealRegistration	DealRegistration.DRExpiryPDQLayout	Deal Registrations Expiring in the Next 30 Days
DealRegistration	DealRegistration.DRNoActivityPDQLayout	Deal Registrations with no Activity in the Past 30 Days
DealRegistration	DealRegistration.MyApprovalPDQLayout	Deal Registrations Waiting for My Approval
DealRegistration	DealRegistration.RecentlyCreatedPDQLayout	Recently Created Deal Registrations
Exam	Exam.AllList	Exam Lists
Exam	Exam.AllRecentlyCreated	Recently Created Exams
Exam	Exam.AllRecentlyIntroduced	Recently Introduced Exams
Exam	Exam.AllRecentlyModified	Recently Modified Exams
Exam	Exam.AllRetiring	Retiring Exams
Exam	Exam.MyList	My Exams

Object Name	Homepage Section Layout Name	Display Name (ENU)
Exam	Exam.MyRecentlyCreated	My Recently Created Exams
Exam	Exam.MyRecentlyModified	My Recently Modified Exams
Exam	Exam.MyRecentlyViewedListLayout	My Recently Viewed Exams
FinancialAccount	FinancialAccount.AllList	Financial Account Lists
FinancialAccount	FinancialAccount.AllRecentlyModified	Recently Modified Financial Accounts
FinancialAccountHolder	FinancialAccountHolder.AllList	Financial Account Holder Lists
FinancialAccountHolder	FinancialAccountHolder.AllRecentlyModified	Recently Modified Financial Account Holders
FinancialAccountHolding	FinancialAccountHolding.AllList	Financial Account Holding Lists
FinancialAccountHolding	FinancialAccountHolding.AllRecentlyModified	Recently Modified Financial Account Holdings
FinancialPlan	FinancialPlan.AllList	Financial Plan Lists
FinancialPlan	FinancialPlan.AllRecentlyModified	Recently Modified Financial Plans
FinancialProduct	FinancialProduct.AllList	Financial Product Lists
FinancialProduct	FinancialProduct.AllRecentlyModified	Recently Modified Financial Products
FinancialTransaction	FinancialTransaction.AllList	Financial Transaction Lists
FinancialTransaction	FinancialTransaction.AllRecentlyModified	Recently Modified Financial Transactions
Fund	All Pending Fund Requests	Pending Fund Requests
Fund	FundList	Fund Lists
Fund	FundRequestList	All Fund Requests
Fund	FundRequestOpenActivities	Fund Request - Open Activities
Fund	My Pending Fund Requests	My Pending Fund Requests

Object Name	Homepage Section Layout Name	Display Name (ENU)
HCPContactAllocation	HCPContactAllocation.AllList	HCP Contact Allocation Lists
HCPContactAllocation	HCPContactAllocation.AllRecentlyModified	Recently Modified HCP Contact Allocations
Homepage	Account Analysis Report	Account Analysis
Homepage	AccountsRecentlyViewedList	My Recently Viewed Accounts
Homepage	Active Campaign Status Report	Active Campaign Status
Homepage	Alert	Alerts
Homepage	ApptList	Appointments
Homepage	CampaignsRecentlyViewedList	My Recently Viewed Campaigns
Homepage	Contact Analysis By Account Report	Contact Analysis By Account
Homepage	ContactsRecentlyViewedList	My Recently Viewed Contacts
Homepage	FavoriteContactsList	Favorite Contacts
Homepage	Homepage Task	Open Tasks
Homepage	Lead Followup Analysis Report	Lead Followup Analysis
Homepage	LeadsRecentlyViewedList	My Recently Viewed Leads
Homepage	MyRecentlyCreatedLeads	My Recently Created Leads
Homepage	MyRecentlyModifiedAccounts	My Recently Modified Accounts
Homepage	MyRecentlyModifiedCampaigns	My Recently Modified Campaigns
Homepage	MyRecentlyModifiedContacts	My Recently Modified Contacts
Homepage	MyRecentlyModifiedOpportunities	My Recently Modified Opportunities
Homepage	MyRecentlyModifiedSolutions	My Recently Modified Solutions
Homepage	New Account	Recently Modified Accounts

Object Name	Homepage Section Layout Name	Display Name (ENU)
Homepage	New Campaign	Recently Modified Campaigns
Homepage	New Contact	Recently Modified Contacts
Homepage	New Lead	Recently Modified Leads
Homepage	New Opportunity	Recently Modified Opportunities
Homepage	New Service Request	My Open Service Requests
Homepage	New Solution	Recently Created Solutions
Homepage	Open Service Request Analysis Report	Open Service Request Analysis
Homepage	OpptyRecentlyViewedList	My Recently Viewed Opportunities
Homepage	Pipeline Analysis Report	Pipeline Analysis For Current Quarter
Homepage	Pipeline Quality Report	Pipeline Quality For Current Quarter
Homepage	SolutionsRecentlyViewedList	My Recently Viewed Solutions
Homepage	TaskList Home	My Open Tasks
Household	All Recently Created Households	Recently Created Households
Household	All Recently Modified Households	Recently Modified Households
Household	HouseholdList	Household Lists
Household	HouseholdsRecentlyViewedList	My Recently Viewed Households
Household	My Recently Created Households	My Recently Created Households
Household	My Recently Modified Households	My Recently Modified Households
InsuranceProperty	InsuranceProperty.AllList	Insurance Property Lists
InsuranceProperty	InsuranceProperty.AllRecentlyModified	Recently Modified Insurance Properties
InvolvedParty	InvolvedParty.AllList	Involved Party Lists

Object Name	Homepage Section Layout Name	Display Name (ENU)
InvolvedParty	InvolvedParty.AllRecentlyModified	Recently Modified Involved Parties
Lead	All Recently Created Leads	Recently Created Leads
Lead	All Recently Modified Leads	Recently Modified Leads
Lead	AllOpenLeadTasks	Lead Tasks
Lead	HomepageLeadsList	Lead Lists
Lead	Homepage My Recent Assigned Leads	My Recently Assigned Leads
Lead	Lead Followup Analysis Report	Lead Followup Analysis
Lead	LeadList	Qualified Leads
Lead	LeadsRecentlyViewedList	My Recently Viewed Leads
Lead	MyCurrentLeadTasks	My Current Lead Related Tasks
Lead	MyOpenLeadTasks	My Open Lead Related Tasks
Lead	MyRecentlyCreatedLeads	My Recently Created Leads
Lead	MyRecentlyModifiedLeads	My Recently Modified Leads
MDFRequest	MDFRequest.AllList	All MDF Requests
MDFRequest	MDFRequest.AllPending	All Pending MDF Requests
MDFRequest	MDFRequest.AllRecentlyCreated	Recently Created MDF Requests
MDFRequest	MDFRequest.AllRecentlyModified	Recently Modified MDF Requests
MDFRequest	MDFRequest.MyApproved	My Approved MDF Requests
MDFRequest	MDFRequest.MyList	My MDF Requests
MDFRequest	MDFRequest.MyPending	My Pending MDF Requests
MDFRequest	MDFRequest.MyRecentlyCreated	My Recently Created MDF Requests

Object Name	Homepage Section Layout Name	Display Name (ENU)
MDFRequest	MDFRequest.MyRecentlyModified	My Recently Modified MDF Requests
MDFRequest	MDFRequest.PendingMyApproval	MDF Requests Pending My Approval
MedEdEvent	All Recently Created MedEd Events	Recently Created Events
MedEdEvent	All Recently Modified MedEd Events	Recently Modified Events
MedEdEvent	Homepage Task MedEd	Event-Related Tasks
MedEdEvent	MedEdList	Event Lists
MedEdEvent	MedEdsRecentlyViewedList	My Recently Viewed Events
MedEdEvent	My Recently Created MedEd Events	My Recently Created Events
MedEdEvent	My Recently Modified MedEd Events	My Recently Modified Events
Opportunity	All Recently Created Opportunities	Recently Created Opportunities
Opportunity	All Recently Modified Opportunities	Recently Modified Opportunities
Opportunity	AllOpenOpptyTasks	Opportunity Tasks
Opportunity	HomepageOpptyList	Opportunity Lists
Opportunity	MyCurrentOpptyTasks	My Current Opportunity Related Tasks
Opportunity	MyOpenOpptyTasks	My Open Opportunity Related Tasks
Opportunity	MyRecentlyCreatedOpportunities	My Recently Created Opportunities
Opportunity	MyRecentlyModifiedOpportunities	My Recently Modified Opportunities
Opportunity	OpptyRecentlyViewedList	My Recently Viewed Opportunities
Opportunity	Pipeline Analysis Report	Pipeline Analysis For Current Quarter
OracleSocialNetwork	OracleSocialNetwork.AllList	Social Lists
OracleSocialNetwork	OracleSocialNetwork.AllRecentlyModified	Recently Modified Social

Object Name	Homepage Section Layout Name	Display Name (ENU)
Order	Order.AllList	Order Lists
Order	Order.AllRecentlyCreated	All Recently Created Orders
Order	Order.MyRecentlyCreated	My Recently Created Orders
Order	Order.RecentlyViewed	My Recently Viewed Orders
Partner	All Recently Created Partners	Recently Created Partners
Partner	All Recently Modified Partners	Recently Modified Partners
Partner	HomepagePartnerList	Partner Lists
Partner	MyRecentlyCreatedPartners	My Recently Created Partners
Partner	MyRecentlyModifiedPartners	My Recently Modified Partners
Partner	PartnersRecentlyViewedList	My Recently Viewed Partners
Patient	All Recently Created Patients	Recently Created Patients
Patient	All Recently Modified Patients	Recently Modified Patients
Patient	My Recently Created Patients	My Recently Created Patients
Patient	My Recently Modified Patients	My Recently Modified Patients
Patient	PatientList	Patient Lists
Patient	PatientsRecentlyViewedList	My Recently Viewed Patients
Policy	Policy.AllList	Policy Lists
Policy	Policy.AllRecentlyModified	Recently Modified Policies
Policy	Policy.MyPoliciesList	My Policies
PolicyHolder	PolicyHolder.AllList	Policy Holder Lists
PolicyHolder	PolicyHolder.AllRecentlyModified	Recently Modified Policy Holders

Object Name	Homepage Section Layout Name	Display Name (ENU)
Portfolio	All Recently Created Portfolios	Recently Created Portfolios
Portfolio	All Recently Modified Portfolios	Recently Modified Portfolios
Portfolio	My Recently Created Portfolios	My Recently Created Portfolios
Portfolio	My Recently Modified Portfolios	My Recently Modified Portfolios
Portfolio	PortfolioList	Portfolio Lists
Portfolio	PortfoliosRecentlyViewedList	My Recently Viewed Portfolios
ProductIndication	ProductIndication.AllList	Product Indication Lists
ProductIndication	ProductIndication.AllRecentlyModified	Recently Modified Product Indications
Program	All Active Partner Programs	All Active Partner Programs
Program	All Inactive Partner Programs	All Inactive Partner Programs
Program	All Recently Created Partner Programs	Recently Created Partner Programs
Program	All Recently Modified Partner Programs	Recently Modified Partner Programs
Program	HomepagePartnerProgramList	Partner Programs Lists
Program	MyRecentlyCreatedPartnerPrograms	My Recently Created Partner Programs
Program	MyRecentlyModifiedPartnerPrograms	My Recently Modified Partner Programs
Program	PartnerProgramsRecentlyViewedList	My Recently Viewed Partner Programs
Quote	Quote.AllList	Quote Lists
Quote	Quote.AllRecentlyCreated	All Recently Created Quotes
Quote	Quote.MyRecentlyCreated	My Recently Created Quotes
Quote	Quote.RecentlyViewed	My Recently Viewed Quotes
SampleRequest	SampleRequest.AllList	Sample Request Lists



Object Name	Homepage Section Layout Name	Display Name (ENU)
SampleRequest	SampleRequest.AllRecentlyModified	Recently Modified Sample Requests
Service Request	AllOpenServiceRelatedTasks	Service Request-Related Tasks
Service Request	HomepageSRList	Service Request Lists
Service Request	My Open Service Requests Short	My Open Service Requests
Service Request	MyCurrentServiceRelatedTasks	My Current Service Request Related Tasks
Service Request	MyOpenServiceRelatedTasks	My Open Service Request Related Tasks
Service Request	Open Service Request Analysis Report	Open Service Request Analysis
SharedAddress	SharedAddress.AllList	Address Lists
SharedAddress	SharedAddress.AllRecentlyModified	Recently Modified Addresses
SocialMedia	SocialMedia.AllList	Social Media Lists
SocialMedia	SocialMedia.AllRecentlyModified	Recently Modified Social Media
SocialProfile	SocialProfile.AllList	Social Profile Lists
SocialProfile	SocialProfile.AllRecentlyModified	Recently Modified Social Profiles
Solution	All Recently Created Solutions	Recently Created Solutions
Solution	All Recently Modified Solutions	Recently Modified Solutions
Solution	Highest Rated Solutions	Highest Rated Solutions
Solution	Most Active Solutions	Most Active Solutions
Solution	MyRecentlyCreatedSolutions	My Recently Created Solutions
Solution	MyRecentlyModifiedSolutions	My Recently Modified Solutions
Solution	SolutionList	Solution Lists
Solution	SolutionsRecentlyViewedList	My Recently Viewed Solutions

Object Name	Homepage Section Layout Name	Display Name (ENU)
SPRequest	SPRequest.AllList	Special Pricing Request Lists
SPRequest	SPRequest.AllPending	All Pending Special Pricing Requests
SPRequest	SPRequest.AllRecentlyCreated	Recently Created Special Pricing Requests
SPRequest	SPRequest.AllRecentlyModified	Recently Modified Special Pricing Requests
SPRequest	SPRequest.MyApproved	My Approved Special Pricing Requests
SPRequest	SPRequest.MyPending	My Pending Special Pricing Requests
SPRequest	SPRequest.MyRecentlyCreated	My Recently Created Special Pricing Requests
SPRequest	SPRequest.MyRecentlyModified	My Recently Modified Special Pricing Requests
SPRequest	SPRequest.PendingMyApproval	Special Pricing Requests Pending My Approval
Vehicle	All Recently Created Vehicles	Recently Created Vehicles
Vehicle	All Recently Modified Vehicles	Recently Modified Vehicles
Vehicle	My Recently Created Vehicles	My Recently Created Vehicles
Vehicle	My Recently Modified Vehicles	My Recently Modified Vehicles
Vehicle	VehicleHomepageSRList	Vehicle-Related Service Requests
Vehicle	VehicleList	Vehicle Lists
Vehicle	VehiclesRecentlyViewedList	My Recently Viewed Vehicles

# 42 Privilege IDs and Names

## Privilege IDs and Names

This appendix contains the following topic:

- *Privilege IDs and Their Corresponding Names and Descriptions*

## Privilege IDs and Their Corresponding Names and Descriptions

The following table lists the privilege IDs in the XML files, and their corresponding privilege names, privilege categories, and privilege descriptions as they appear in the English-American (ENU) user interface of Oracle CRM On Demand.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
ACCESS_ATT_EXPORT	Access all Export Request Attachments	Data Management: Export	Access attachments for all requests in the Export Queue.
ACCESS_ATT_IMPORT	Access all Import Request Attachments	Data Management: Import	Access attachments for all requests in the Import Queue.
ADMIN_ACTIONBAR_PERSONALIZATION	Personalize Action Bar	My Setup	Access to Action bar personalization.
ADMIN_ADVANCED_FIELD_MGMT	Advanced Field Management	Customization: Data	Set up advanced field management features such as advanced default values and custom field validation rules.
ADMIN_BATCH_ASSIGN_TEAM	Batch Assign Team Member	Data Management	Assign team member to multiple records in bulk.
ADMIN_BATCH_DELETE	Batch Delete and Restore	Data Management	Delete and restore lists of a record type in a batch.
ADMIN_CHILD_DISPLAY	Personalize Related Information Display Format	My Setup	User can choose the related information display format between tabs or lists.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
ADMIN_COMP_AUDIT	Manage Company - Sign In and Company Audit	Admin: Company Administration	View the Sign In and Company audit trails.
ADMIN_COMP_PROFILE	Manage Company	Admin: Company Administration	Manage company profile, set security policies, activate languages, define fiscal calendars and create Homepage alerts.
ADMIN_CONT_MGMT	Manage Content	Admin: Content Management	Manage content areas such as Products and Assessments.
ADMIN_CUSTOM_ICONS	Manage Custom Icons	Admin: Content Management	Upload and manage custom icons.
ADMIN_DETAILPAGE_FIELDS_PERSONALIZATION	Personalize Detail Page - Fields	My Setup	Access to detail page field personalization.
ADMIN_DETAILPAGE_PERSONALIZATION	Personalize Detail Page - Related Information	My Setup	Access to detail page related information personalization.
ADMIN_DETAILPAGE_RECORDS_IND_PERS	Personalize Detail Page - Records Indicator	My Setup	Access to enable or disable related information records indicator.
ADMIN_DYNAMIC_LAYOUT	Customize Application - Manage Dynamic Layouts	Customization: Layout	Define Dynamic Layouts and assign them to Roles.
ADMIN_EDIT_ACT_STATUS_PICKLIST	Customize Application - Edit Activity 'Status' Picklist	Customization: Data	Edit the 'Status' picklist on the Activity object.
ADMIN_EDIT_SR_STATUS_PICKLIST	Customize Application - Edit Service Request 'Status' Picklist	Customization: Data	Edit the 'Status' picklist on the Service Request object.
ADMIN_EXEC_REPORT_IMMEDIATELY	Manage Homepage Custom Report Execution	Customization: Layout	Displays the Execute Report Immediately check box on the homepage custom report wizard.
ADMIN_EXPORT	Admin Export	Data Management: Export	Export all types of data.
ADMIN_FIELD_AUDIT	Administer Field Audit	Customization: Data	Add, edit or remove fields from the list of Audited fields for supported objects.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
ADMIN_HOMEPAGE_CUSTOMIZATION	Customize Application - Manage Homepage Customization	Customization: Layout	Create and manage custom homepages and assign them to Roles
ADMIN_HOMEPAGE_PERSONALIZATION	Personalize Homepages	My Setup	Access to homepage personalization.
ADMIN_IMPORT	Admin Import	Data Management: Import	Import all types of data.
ADMIN_INT_EVENT_QUEUES	Manage Integration Event Queues	Data Management	Define and Edit Integration Event Queues.
ADMIN_MANAGE_USERS	Manage Users	Admin: Users and Access Controls	Manage Users and establish User Quotas.
ADMIN_MASS_UPDATE	Mass Update Any Field	Data Management	Update values across multiple records for a record type.
ADMIN_MASS_UPDATE_EDITABLE_FIELDS	Mass Update Editable Fields Available on the Page Layout	Data Management	Allow mass update on fields available on page layout but not read-only.
ADMIN_MERGE_RECORDS	Merge Records	Data Management	Merge duplicate records into single master record.
ADMIN_MERGE_RECORDS_WITHOUT_DELETE	Merge Records Without Delete Access	Data Management	Merge duplicate records into single master record even when the user does not have delete access.
ADMIN_PERSONAL_EXTRACT	Manage Personal Extract	Data Management: Export	Manage and generate personal extracts for offline clients.
ADMIN_SHARED_ADDRS	Manage Addresses	CRM	Manage Addresses
ADMIN_TAB_PERSONALIZATION	Personalize Tabs	My Setup	Access to tab personalization.
ADMIN_TERRITORY	Manage Territories	Admin: Users and Access Controls	Manage Territories and Territory Hierarchy.
ADMIN_USERS_ROLES	Manage Roles and Access	Admin: Users and Access Controls	Define Access Profiles, Roles and Groups to manage data access controls, as well as ability to globally reset layouts for Roles.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
ADMIN_WORKFLOW	Manage Data Rules - Manage Workflow Rules	Customization: Business Rules	Define and manage workflow rules
ADMIN_WORKFLOW_USER	Manage Data Rules - Manage Workflow Rules for Users.	Customization: Business Rules	Define and manage Workflow rules for Users.
ANALYTICS_PERS_RPTS	Manage Personal Reports	Analytics	Manage Analytics Personal Reports
ANALYTICS_SCRIPTING	Analytics Scripting	Analytics	Create Analytics Reports with views and data formats that can contain HTML or JavaScript.
ARCHIVE_LEADS	Archive Leads	CRM: Marketing	Archive Leads that are no longer worth pursuing.
AUDIT_IMPORT	Manage Record Auditing for Imports	Data Management: Import	Manage the ability to enable or disable record auditing during an import request.
BASIC_SAMPLES_OPERATIONS	Enable Basic Samples Operations	Industry Specific: Life Sciences	Manage own Inventory Counts, Reconciliation, Samples Transfers, Other Transactions.
CHANGE_ORG_PASSWORD	Change Company Passwords using Web Services	Integration: Web Services	Change passwords of users in the company using Web Services.
CHANGE_OWN_PASSWORD	Reset Personal Password	My Setup	Allow users to change their current password to a new password.
CHECK_RELATED_RECORDS	Check Related Records	Customization: Business Rules	Checks related records for the existence of one or more records that matches a specified search criteria, and displays an error message if no match is found.
CLIENT_SIDE_EXT_UPLOAD	Upload Client Side Extensions and Manage Custom HTML Head Tag	Customization	Ability to upload custom extensions and manage custom HTML head tag.
CONVERT_DEALREGISTRATIONS	Convert Deal Registrations	PRM	Convert Deal Registrations to Accounts, Contacts and Opportunities.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
CONVERT_LEADS	Convert Leads	CRM: Marketing	Convert Leads to Accounts, Contacts, and Opportunities.
CREATE_CUSTOM_REPORTS	Manage Custom Reports	Analytics	Create, save, and publish customized Analytics charts and reports.
CREATE_PUB_SMART_CALLS	Calls: Create Public Smart Calls	Industry Specific: Life Sciences	Create public Smart Call templates.
CRM_DESKTOP_INT	Enable CRM Desktop Access	Desktop/Mobile	Download the CRM Desktop Client and synchronize data with CRM On Demand.
CRM_DESKTOP_LITE_INT	Enable CRM Desktop Lite Access	Desktop/Mobile	Download the CRM Desktop Lite Client and synchronize data with CRM On Demand.
CROSS_SUBJECT_ANALYTICS	Cross-Subject Areas Analytics	Analytics	Create Analytics Reports using multiple subject areas
CTI_ACCESS_CALL	Access Call Communications	Integration: CTI	Access to calls from Communication Homepage.
CTI_ACCESS_CHAT	Access Chat Communications	Integration: CTI	Access to chats from Communication Homepage.
CTI_ACCESS_EMAIL	Access Email Communications	Integration: CTI	Access to emails from Communication Homepage.
CTI_ACCESS_VMAIL	Access Voicemail Communications	Integration: CTI	Access to voicemails from Communication Homepage.
CUSTOMIZE_APP	Customize Application	Customization	Create custom page layouts, homepage layouts, change field names, modify field picklists, define cascading picklists, create custom fields and rename objects.
DEFINE_ASSIGN_RULES	Data Rules and Assignment	Customization: Business Rules	Define routing rules for Leads, Accounts, Opportunities and Service Requests. Administer Forecasts, Lead Conversion Mapping and Lead Conversion Layouts, and set up Industry picklist values.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
DEFINE_CURRENCIES	Manage Company - Define Currencies	Admin: Company Administration	Manage currencies and exchange rates.
DEFINE_PUBLIC_LISTS	Manage Public Lists	Data Management	Create, Edit and Delete Public Lists.
DEFINE_SALES_PROCESS	Manage Data Rules - Manage Sales Stage Definition	Customization: Business Rules	Define Sales Methodologies and company-specific Sales Processes.
DELETE_ANY_ACTIVITY	Delete Any Activity	Data Management	Delete any Activity regardless of record state, privacy, or relationship.
DELETE_EXPORT_REQ_ATT	Delete Export Request Attachments	Data Management: Export	Ability to delete attachments for requests in the Export Queue.
DELETE_PRIVATE_LISTS	Delete Private Lists	Data Management	Delete Private Lists created by any users of your company.
DEPLOY_CUSTOM_CODE	Deploy Custom Code	Integration: Hosting	Deploy custom Web applications to the (Java Cloud).
ELOQUA_INT	Oracle Eloqua Marketing Cloud Service Integration	Integration: Eloqua	Enable integration with Oracle Eloqua Marketing Cloud Service
ELOQUA_INTEGRATION	Eloqua Integration	CRM: Marketing	Enable integration with Eloqua
EXPOSE_ALL_FIELDS	All fields in Search and Lists	Customization: Layout	Expose all fields in Advanced Search and Lists. This includes fields that are not displayed in the Detail Page.
FULL_ACCESS_ANALYTICS	Access All Data in Analytics	Analytics	Access all data in Analytics charts and reports.
FULL_ACCESS_FORECASTS	Access All Forecasts	CRM: Sales	Manage forecast frequency and participants, and access all Forecasts.
FUSION_MOBILE	Connected Mobile Sales Access	Desktop/Mobile	Enable access to the Connected Mobile Sales Application.



Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
FUSION_MOBILE_APP_COMPOSER	Connected Mobile Sales Application Composer Access	Desktop/Mobile	Enable access to the Connected Mobile Sales Application Composer.
GRANT_ASSESSMENTS	Manage Assessments Access	CRM	Manage access to Assessments.
GRANT_BUSNPLAN	Manage Business Planning Access	CRM: Sales	Manage access to Account Planning
GRANT_CALLS	Calls: Manage Calls	Industry Specific: Life Sciences	Manage access to Calls.
GRANT_CHANGE_ORG_PASSWORD	Manage Company Password Access	Integration: Web Services	Manage access to Change Company Password privilege.
GRANT_CONTACT_INTERESTS	Manage Contact Interests Access	CRM	Manage access to Contact Interests.
GRANT_CRM_DESKTOP_INT	Manage CRM Desktop Access	Desktop/Mobile	Customize CRM Desktop metadata and manage access for CRM Desktop.
GRANT_CRM_DESKTOP_LITE_INT	Manage CRM Desktop Lite Access	Desktop/Mobile	Manage access for CRM Desktop Lite.
GRANT_CTI	Manage CTI On Demand Access	Integration: CTI	Manage access to CTI On Demand Integration.
GRANT_CUSTOM_OBJ1	Customize Application - Manage Custom Object 01	Customization: Data	Manage access to Custom Object 01.
GRANT_CUSTOM_OBJ1115	Customize Application - Manage Custom Objects 11-15	Customization: Data	Manage access to Custom Objects 11-15.
GRANT_CUSTOM_OBJ1620	Customize Application - Manage Custom Objects 16-20	Customization: Data	Manage access to Custom Objects 16-20.
GRANT_CUSTOM_OBJ2	Customize Application - Manage Custom Object 02	Customization: Data	Manage access to Custom Object 02.
GRANT_CUSTOM_OBJ2125	Customize Application - Manage Custom Objects 21-25	Customization: Data	Manage access to Custom Objects 21-25.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
GRANT_CUSTOM_OBJ2630	Customize Application - Manage Custom Objects 26-30	Customization: Data	Manage access to Custom Objects 26-30.
GRANT_CUSTOM_OBJ3	Customize Application - Manage Custom Object 03	Customization: Data	Manage access to Custom Object 03.
GRANT_CUSTOM_OBJ3135	Customize Application - Manage Custom Objects 31-35	Customization: Data	Manage access to Custom Objects 31-35.
GRANT_CUSTOM_OBJ3640	Customize Application - Manage Custom Objects 36-40	Customization: Data	Manage access to Custom Objects 36-40.
GRANT_CUSTOM_OBJ410	Customize Application - Manage Custom Objects 04-10	Customization: Data	Manage access to Custom Objects 04-10.
GRANT_DEALERS	Manage Dealers Access	Industry Specific: Automotive	Manage access to Dealers.
GRANT_ELOQUA_INT	Manage Oracle Eloqua Marketing Cloud Service Integration	Integration: Eloqua	Manage access to Oracle Eloqua Marketing Cloud Service integration.
GRANT_FIN	Manage Banking Custom Objects	Industry Specific: Financial Services	Manage access to Finance objects.
GRANT_FUND_REQS	Manage Fund Requests Access	CRM: Partners	Manage access to Fund Requests
GRANT_FUNDS	Manage Funds Access	CRM: Partners	Manage access to Funds
GRANT_FUSION_MOBILE	Manage Connected Mobile Sales Access	Desktop/Mobile	Manage access to Connected Mobile Sales.
GRANT_HOUSEHOLDS	Manage Households Access	Industry Specific: Financial Services	Manage access to Households.
GRANT_INSUR	Manage Insurance Custom Objects	Industry Specific: Financial Services	Manage access to Insurance Objects.
GRANT_ISALES_INT	Manage Disconnected Mobile Sales Access	Desktop/Mobile	Manage access to Disconnected Mobile Sales.
GRANT_MAPS_INT	Manage Maps Integration	Integration: Maps	Manage access to Maps Integration

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
GRANT_MEDED	Manage Events Access	Industry Specific: Life Sciences	Manage access to Events.
GRANT_MOD_TRACKING	Manage Modification Tracking	Admin: Company Administration	Manage Modification Tracking.
GRANT_ORDER_MGMT_INT	Enable Order Access	CRM: Sales	Enable Pre-Built Integration to Order Management System
GRANT_OSN_INT	Manage Oracle Social Network Integration	Integration: OSN	Manage access to Oracle Social Network Integration
GRANT_PATIENTS	Manage Patients Access	Industry Specific: Life Sciences	Manage access to Patients.
GRANT_PCD	Manage Personalized Content Delivery	Industry Specific: Life Sciences	Manage access to Personalized Content Delivery
GRANT_PERIOD	Manage Period Administration	CRM: Sales	Manage access to Period Administration
GRANT_PHARMA	Manage Pharmaceutical Access	Industry Specific: Life Sciences	Manage access to Pharmaceutical
GRANT_PORTFOLIOS	Manage Portfolios Access	Industry Specific: Financial Services	Manage access to Portfolios.
GRANT_PRM	Manage PRM Access	PRM	Manage access to PRM.
GRANT_QUOTE_MGMT_INT	Enable Quote Creation Access	Integration: Pre-Built	Enable Pre-Built Integration to Quote Management System
GRANT_REFERRALS	Manage Referrals	CRM: Sales	Manage access to Referrals.
GRANT_RELATIONSHIPS	Manage Extended Contact and Account Relationship Access	CRM	Manage access to extended Contact and Account Relationship.
GRANT_REVENUES	Manage Contact and Account Revenues Access	CRM: Sales	Manage access to Revenues.
GRANT_SEM_INT	Manage Social Engagement & Monitoring Access	Integration: SEM	Manage access to Social Engagement & Monitoring Integration

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
GRANT_SONGO_CLIENT	Manage Incremental Down Sync for Life Sciences Offline Client	Industry Specific: Life Sciences	Manage Incremental Down Sync for Life Sciences Offline Client
GRANT_VEHICLES	Manage Vehicles Access	Industry Specific: Automotive	Manage access to Vehicles.
GRANT_WEB_SERVICES_INT	Manage Access to Web Services	Integration: Web Services	Manage access to Enable Web Services Access privilege.
ISALES_INT	Disconnected Mobile Sales Access	Desktop/Mobile	Enable access to Disconnected Mobile Sales.
LIST_EXPORT	List - Export Displayed Fields	Data Management: Export	Export fields displayed on a list.
LIST_EXPORT_ALL_FIELDS	List - Export All Fields	Data Management: Export	Export all fields for a Record Type. This includes fields that are not displayed in the List.
LS_PLANNED_CALLS	Calls: Calendar Planned Calls	Industry Specific: Life Sciences	Display Planned Calls Applet in Calendar
LS_SONGO_ADMIN	Enable Life Sciences Offline Client Admin Functionality	Industry Specific: Life Sciences	Enable Life Sciences Offline Client Admin Functionality
MANAGE_ACCT_RELATIONSHIPS	Access Extended Account Relationship	CRM: Sales	Create, edit and delete Extended Account Relationship.
MANAGE_ATTACHMENTS	Manage Content - Manage Attachments and Detail Page Images	Admin: Content Management	Manage all Attachments and all Detail Page Images.
MANAGE_BOOKS	Manage Books	Admin: Users and Access Controls	Manage Book access, bulk assign data to Books and define Book related workflows.
MANAGE_CAMPAGNS	Manage Campaigns	CRM: Marketing	Create and edit Campaigns.
MANAGE_CUSTOM_WEB_APPLETS	Manage Custom Web Applets	Integration: Widgets	Create, edit and publish custom web applets.
MANAGE_DASHBOARDS	Manage Dashboards	Analytics	Create, manage and design custom dashboards.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
MANAGE_DELEGATES	Manage Users and Access - Manage Delegated Users	Admin: Users and Access Controls	Manage delegation of a user's data visibility and access rights to other users.
MANAGE_DYNAMIC_CUSTOM_OBJECTS	Manage Dynamic Custom Objects	Customization: Data	Define and apply dynamic custom objects.
MANAGE_FUTURE_BOOKS	Manage Future Books	Admin: Users and Access Controls	Create future data and Book relationships based on start date using Import or Web Services. Expire data and Book relationships based on end date using Import or Web Services.
MANAGE_PRIVATE_LISTS	Manage Private Lists	Data Management	View and Edit Private Lists created by any users of your company.
MANAGE_PRM_BK_WF	Manage PRM Books and Workflows	PRM	Setup PRM Books and configure PRM Workflows.
MANAGE_ROLE_LIST_ORDER	Manage Role Lists Order	Customization	Assign public lists to various roles with List Order Layout, from list save page.
MANAGE_THEMES	Manage Themes	Admin: Company Administration	Create and manage Themes
MANAGE_UAN_QUEUE	Enable Integration Event Access	Integration: Integration Event	Enable the ability to get and delete events from Integration Event queue(s) using Web services
MAPS_INT	Maps Integration	Integration: Maps	Enable integration with Maps
MARKETING_IMPORT	Marketing Import	Data Management: Import	Import Leads, Accounts, Contacts, Products and Assets.
MASTER_AUDIT_TABLE	Access Master Audit Trail and Admin Configuration Audit	Admin: Company Administration	Ability to access the Master Audit Trail that displays all auditable data changes across the application and Admin Configuration Audit that displays changes that users have made to various admin configurations.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
MASTER_EXPORT_REQS	Access Master Export Requests	Admin: Company Administration	View all Data Export Assistant Export requests and List Export requests.
ODM_INTEGRATION	CRM On Demand Marketing Access	CRM On Demand Marketing	Enable access to CRM On Demand Marketing.
OEL_NEI	Outlook/Notes Email Integration	Desktop/Mobile	Link emails to Account, Contact, Lead, Opportunity, or Service Request records.
OPS_EDIT_COMP_STATUS	Edit Company Status for Operations	Admin: Company Administration	Edit the status of any Company to values that are available only to Operations personnel.
OSN_INT	Oracle Social Network Integration	Integration: OSN	Enable integration with Oracle Social Network applications
OVERRIDE_PROCESS_ADMINISTRATION	Override Process Administration	Customization: Business Rules	Bypass all Process Administration business rules.
PARTNER_OFFERINGS	Partner Offerings	CRM: Marketing	Display recommended partners within CRM On Demand under My Setup
PARTNER_TRIAL_OFFERINGS	Partner Trial Offerings	CRM: Marketing	Display recommended Partners in the Action Bar (English Only).
PERSONAL_EXPORT	Personal Export	Data Management: Export	Export data to which the role has read access.
PERSONAL_IMPORT	Personal Import	My Setup	Import your Contacts
PRM_PARTNER_ADMIN	Manage Users within the Partner Organization.	PRM	Manage Users within the Partner Organization.
PRM_VIEW_BRAND_OWNER_USERS	View Brand Owner Users in Lookup	PRM	Access to view and select Brand Owner users in user lookups.  <b>Note:</b> The privilege is applicable for Partner users only.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
PROCESS_ADMINISTRATION	Process Administration	Customization: Business Rules	Define role-based business processes with conditional state transitions and dynamic access controls.
PRODUCER_WIDGETS	Embed CRM On Demand Widgets	Integration: Widgets	Access CRM On Demand content outside of the CRM On Demand application.
PUBLISH_SOLUTIONS	Publish Solutions	CRM	Approve and edit Solutions.
QUALIFY_LEADS	Qualify Leads	CRM: Marketing	Classify Leads as being Qualified.
RECOVER_ALL_RECORDS	Recover All Records	Data Management	Recover Deleted Items discarded by any user.
REJECT_LEADS	Reject Leads	CRM: Marketing	Reject previously Qualified Leads.
RESET_ORG_PASSWORD	Manage Company - Reset All Passwords	Admin: Company Administration	Reset passwords of all users of your company.
REST_SERVICES_INT	Restful Services Integration	Integration: Restful Services	Send requests to the Restful Services Integration.
SAMPLES_ADJUSTMENT	Enable Samples Adjustment	Industry Specific: Life Sciences	Adjust Transactions
SEM_INT	Social Engagement & Monitoring Integration	Integration: SEM	Enable integration with Social Engagement & Monitoring applications
SHARED_CALENDAR	Share Calendar	CRM	Share calendars with other users in the company.
TAB_ANALYTICS_V3	Access V3 Analytics	Analytics	Access the V3 Analytics Tab for Reports and Dashboards
TAB_COMMUNICATIONS	Access Communications Homepage	Contact On Demand	Access the Communications homepage.
USAGE_TRACKING	Usage Tracking	Analytics	Access the Usage Tracking subject area.
USE_CALLS	Calls: Enable Call Detailing	Industry Specific: Life Sciences	Add and edit Account Calls and Contact Calls.

Privilege Id	Privilege Name (ENU)	Privilege Category (ENU)	Privilege Description (ENU)
VALIDATE_SHARED_ADDRS	Validate Shared Addresses	CRM	Mark Shared Addresses as validated
VIEW_MASKED_DATA	View Masked Data	CRM	See the full value of fields that are masked.
VIEW_MIGRATED_SHARED_FOLDER	Access Migrated Company Wide Shared Folder	Analytics	Access the Migrated Company Wide Shared Folder in Analytics Catalog
VIEW_PREBUILT_DASHBOARDS	Access Analytics Dashboards - View Prebuilt Dashboards	Analytics	Access the Analytics Prebuilt Dashboards.
VIEW_PREBUILT_REPORTS	Access Analytics Reports - View Prebuilt Analyses	Analytics	View and execute prebuilt analyses and reports.
VIEW_PRIVATE_ACTIVITIES	View Private Activities	Data Management	View private activities for all users of your company.
VIEW_PRIVATE_NOTES	View Private Notes	Data Management	View private notes for all users of your company.
WEB_SERVICES_INT	Enable Web Services Access	Integration: Web Services	Enable the ability to send Web services requests.
WORKFLOW_CANCEL_SAVE	Workflow Cancel Save	Customization: Business Rules	Prevent save operation on 'Before Modified Record Saved'.



# 43 Child Applet IDs and Names

## Child Applet IDs and Names

This appendix contains the following topic:

- *Child Applet IDs and Their Corresponding Names*

## Child Applet IDs and Their Corresponding Names

The following table shows the mapping of child applet IDs in page layout XML files to their corresponding child applet names as they appear in the English-American user interface of Oracle CRM On Demand. The objects for which the child applets can be configured are also shown in the table.

Object System Name	Child Applet Id	Child Applet Name
Account	AccountBookChildList	Books
Account	AccountCallChildList	Calls
Account	AccountCompetitorChildList	Account Competitors
Account	AccountEvent.ChildList	Account Event
Account	AccountFACHildList	Attachments
Account	AccountNoteChildList	Notes
Account	AccountPartnerChildList	Account Partners
Account	AccountPortfolioChildList	Portfolio
Account	AccountRelationshipChildList	Account Relationships
Account	AccountSurveyChildList	Account Survey
Account	AccountTeamChildList	Account Team
Account	ActivityClosedChildList	Completed Activities

Object System Name	Child Applet Id	Child Applet Name
Account	ActivityOpenChildList	Open Activities
Account	AddressChildList	Addresses
Account	AppointmentOpenChildList	Open Appointments
Account	AssetChildList	Assets
Account	Audit Trail.ChildList	Audit Trail
Account	CallActivityHistory.ChildList	Call Activity History
Account	Claim.ChildList	Claims
Account	ContactPersonChildList	Contacts
Account	CRMODLS_BPL_ACNT.ChildList	Plan Accounts
Account	CRMODLS_BusinessPlan.ChildList	Business Plans
Account	CRMODLS_OBJECTIVE.ChildList	Objectives
Account	CustObj1ChildList	Custom Objects 01
Account	CustObj2ChildList	Custom Objects 02
Account	CustObj3ChildList	Custom Objects 03
Account	CustomObject10.ChildList	Custom Objects 10
Account	CustomObject11.ChildList	Custom Objects 11
Account	CustomObject12.ChildList	Custom Objects 12
Account	CustomObject13.ChildList	Custom Objects 13
Account	CustomObject14.ChildList	Custom Objects 14
Account	CustomObject15.ChildList	Custom Objects 15
Account	CustomObject4.ChildList	Custom Objects 04

Object System Name	Child Applet Id	Child Applet Name
Account	CustomObject5.ChildList	Custom Objects 05
Account	CustomObject6.ChildList	Custom Objects 06
Account	CustomObject7.ChildList	Custom Objects 07
Account	CustomObject8.ChildList	Custom Objects 08
Account	CustomObject9.ChildList	Custom Objects 09
Account	DealerVehicleChildList	Vehicles
Account	DealRegistration.ChildList	Deal Registrations
Account	FinancialAccount.Branch.ChildList	Financial Account: Branch
Account	FinancialAccount.ChildList	Financial Accounts
Account	FinancialAccount.Held_Away_Institution.ChildList	Financial Account: Held Away Institution
Account	FinancialAccountHolder.ChildList	Financial Account Holders
Account	FinancialPlan.ChildList	Financial Plans
Account	LeadChildList	Leads
Account	OptyChildList	Opportunities
Account	OracleSocialNetwork.ChildList	Social
Account	Order.ChildList	Orders
Account	Policy.ChildList	Policies
Account	PolicyHolder.ChildList	Policy Holders
Account	Quote.ChildList	Quotes
Account	RevenueChildList	Revenues
Account	SampleRequest.ChildList	Sample Requests

Object System Name	Child Applet Id	Child Applet Name
Account	SPRequest.ChildList	Special Pricing Requests
Account	SRChildList	Service Requests
Account	SubAccountChildList	Sub-Accounts
Account	TaskOpenChildList	Open Tasks
AccountCall	AccountCallContactChildList	Contacts
AccountCall	ActionFACHildList	Attachments
AccountCall	ActionUserChildList	Users
AccountCall	Activity Book.ChildList	Books
AccountCall	ActivityAssessmentChildList	Activity Assessments
AccountCall	AttendeeCallChildList	Attendees
AccountCall	Audit Trail.ChildList	Audit Trail
AccountCall	CallsMessagePlanVBCChildList	Available Message Plans
AccountCall	CallsProdDetailChildList	Products Detailed
AccountCall	CallsProdDetailVBCChildList	Available Products for Detailing
AccountCall	CallsPromItemDropChildList	Promotional Items
AccountCall	CallsPromItemDropVBCChildList	Available Promotional Items for Drop
AccountCall	CallsSampDropChildList	Samples Dropped
AccountCall	CallsSampDropVBCChildList	Available Samples for Drop
AccountCall	CRMOD_LS_Transactions.ChildList	Sample Transactions
AccountCall	CRMODLS_PCD_MSGRSP.ChildList	Message Responses

Object System Name	Child Applet Id	Child Applet Name
AccountCall	CRMODLS_Signature.ChildList	Signature
AccountCall	CustObj1ChildList	Custom Objects 01
AccountCall	CustObj2ChildList	Custom Objects 02
AccountCall	CustObj3ChildList	Custom Objects 03
AccountCall	CustomObject10.ChildList	Custom Objects 10
AccountCall	CustomObject11.ChildList	Custom Objects 11
AccountCall	CustomObject12.ChildList	Custom Objects 12
AccountCall	CustomObject13.ChildList	Custom Objects 13
AccountCall	CustomObject14.ChildList	Custom Objects 14
AccountCall	CustomObject15.ChildList	Custom Objects 15
AccountCall	CustomObject4.ChildList	Custom Objects 04
AccountCall	CustomObject5.ChildList	Custom Objects 05
AccountCall	CustomObject6.ChildList	Custom Objects 06
AccountCall	CustomObject7.ChildList	Custom Objects 07
AccountCall	CustomObject8.ChildList	Custom Objects 08
AccountCall	CustomObject9.ChildList	Custom Objects 09
AccountCall	Fund Request.ChildList	Fund Requests
AccountCall	MedEdSolutionChildList	Solutions
AccountCall	Order.ChildList	Orders
AccountCall	SampleRequest.ChildList	Sample Requests
AccountEvent	Audit Trail.ChildList	Audit Trail

Object System Name	Child Applet Id	Child Applet Name
Accreditation	Accreditation Book.ChildList	Books
Accreditation	AccreditationAttachment.ChildList	Accreditation Attachments
Accreditation	AccreditationCertification.ChildList	Accreditation Certifications
Accreditation	AccreditationProduct.ChildList	Accreditation Products
Accreditation	AccreditationProductCategory.ChildList	Accreditation Product Product Categories
Accreditation	AccreditationRelationship.ChildList	Related Accreditations
Accreditation	AccreditationRequest.ChildList	Accreditation Requests
Accreditation	AccreditationSolution.ChildList	Accreditation Solutions
Accreditation	AccreditationTeam.ChildList	Accreditation Teams
Accreditation	Audit Trail.ChildList	Audit Trail
Accreditation	Custom Object 1.ChildList	Custom Objects 01
Accreditation	Custom Object 2.ChildList	Custom Objects 02
Accreditation	Custom Object 3.ChildList	Custom Objects 03
Accreditation	CustomObject10.ChildList	Custom Objects 10
Accreditation	CustomObject11.ChildList	Custom Objects 11
Accreditation	CustomObject12.ChildList	Custom Objects 12
Accreditation	CustomObject13.ChildList	Custom Objects 13
Accreditation	CustomObject14.ChildList	Custom Objects 14
Accreditation	CustomObject15.ChildList	Custom Objects 15
Accreditation	CustomObject4.ChildList	Custom Objects 04
Accreditation	CustomObject5.ChildList	Custom Objects 05

Object System Name	Child Applet Id	Child Applet Name
Accreditation	CustomObject6.ChildList	Custom Objects 06
Accreditation	CustomObject7.ChildList	Custom Objects 07
Accreditation	CustomObject8.ChildList	Custom Objects 08
Accreditation	CustomObject9.ChildList	Custom Objects 09
Activity	Activity Book.ChildList	Books
Activity	Audit Trail.ChildList	Audit Trail
Activity	CRMOD_LS_Transactions.ChildList	Sample Transactions
Activity	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Activity	CRMODLS_Signature.ChildList	Signature
Activity	CustomObject10.ChildList	Custom Objects 10
Activity	CustomObject11.ChildList	Custom Objects 11
Activity	CustomObject12.ChildList	Custom Objects 12
Activity	CustomObject13.ChildList	Custom Objects 13
Activity	CustomObject14.ChildList	Custom Objects 14
Activity	CustomObject15.ChildList	Custom Objects 15
Activity	CustomObject4.ChildList	Custom Objects 04
Activity	CustomObject5.ChildList	Custom Objects 05
Activity	CustomObject6.ChildList	Custom Objects 06
Activity	CustomObject7.ChildList	Custom Objects 07
Activity	CustomObject8.ChildList	Custom Objects 08
Activity	CustomObject9.ChildList	Custom Objects 09

Object System Name	Child Applet Id	Child Applet Name
Activity	Fund Request.ChildList	Fund Requests
Activity	Order.ChildList	Orders
Activity	SampleRequest.ChildList	Sample Requests
Application	Activity.ChildList	Activities
Application	ActivityClosedChildList	Completed Activities
Application	Application Book.ChildList	Books
Application	ApplicationAttachment.ChildList	Application Attachments
Application	ApplicationTeam.ChildList	Application Teams
Application	AppointmentOpenChildList	Open Appointments
Application	Audit Trail.ChildList	Audit Trail
Application	TaskOpenChildList	Open Tasks
Appointment	ActionContactChildList	Contacts
Appointment	ActionFACHildList	Attachments
Appointment	ActionUserChildList	Users
Appointment	ActivityAssessmentChildList	Activity Assessments
Appointment	ActivityBookChildList	Books
Appointment	Audit Trail.ChildList	Audit Trail
Appointment	CRMOD_LS_Transactions.ChildList	Sample Transactions
Appointment	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Appointment	CRMODLS_Signature.ChildList	Signature
Appointment	CustObj1ChildList	Custom Objects 01



Object System Name	Child Applet Id	Child Applet Name
Appointment	CustObj2ChildList	Custom Objects 02
Appointment	CustObj3ChildList	Custom Objects 03
Appointment	CustomObject10.ChildList	Custom Objects 10
Appointment	CustomObject11.ChildList	Custom Objects 11
Appointment	CustomObject12.ChildList	Custom Objects 12
Appointment	CustomObject13.ChildList	Custom Objects 13
Appointment	CustomObject14.ChildList	Custom Objects 14
Appointment	CustomObject15.ChildList	Custom Objects 15
Appointment	CustomObject4.ChildList	Custom Objects 04
Appointment	CustomObject5.ChildList	Custom Objects 05
Appointment	CustomObject6.ChildList	Custom Objects 06
Appointment	CustomObject7.ChildList	Custom Objects 07
Appointment	CustomObject8.ChildList	Custom Objects 08
Appointment	CustomObject9.ChildList	Custom Objects 09
Appointment	Fund Request.ChildList	Fund Requests
Appointment	MedEdSolutionChildList	Solutions
Appointment	Order.ChildList	Orders
Appointment	SampleRequest.ChildList	Sample Requests
Asset	Asset Association Book.ChildList	Books
Asset	Audit Trail.ChildList	Audit Trail
Asset	CustObj1ChildList	Custom Objects 01

Object System Name	Child Applet Id	Child Applet Name
Asset	CustObj2ChildList	Custom Objects 02
Asset	CustObj3ChildList	Custom Objects 03
Asset	CustomObject4.ChildList	Custom Objects 04
Asset	CustomObject5.ChildList	Custom Objects 05
Asset	CustomObject6.ChildList	Custom Objects 06
Asset	CustomObject7.ChildList	Custom Objects 07
Asset	CustomObject8.ChildList	Custom Objects 08
Asset	CustomObject9.ChildList	Custom Objects 09
Asset	CustomObject10.ChildList	Custom Objects 10
Asset	CustomObject11.ChildList	Custom Objects 11
Asset	CustomObject12.ChildList	Custom Objects 12
Asset	CustomObject13.ChildList	Custom Objects 13
Asset	CustomObject14.ChildList	Custom Objects 14
Asset	CustomObject15.ChildList	Custom Objects 15
Asset	Service Request.ChildList	Service Requests
Attendee Call	Activity Book.ChildList	Books
Attendee Call	Audit Trail.ChildList	Audit Trail
Attendee Call	CallsProdDetailChildList	Products Detailed
Attendee Call	CallsProdDetailVBCChildList	Available Products for Detailing
Attendee Call	CallsPromItemDropChildList	Promotional Items

Object System Name	Child Applet Id	Child Applet Name
Attendee Call	CallsPromItemDropVBCChildList	Available Promotional Items for Drop
Attendee Call	CallsSampDropChildList	Samples Dropped
Attendee Call	CallsSampDropVBCChildList	Available Samples for Drop
Attendee Call	CRMOD_LS_Transactions.ChildList	Sample Transactions
Attendee Call	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Attendee Call	CRMODLS_Signature.ChildList	Signature
Attendee Call	CustObj1ChildList	Custom Objects 01
Attendee Call	CustObj2ChildList	Custom Objects 02
Attendee Call	CustObj3ChildList	Custom Objects 03
Attendee Call	CustomObject10.ChildList	Custom Objects 10
Attendee Call	CustomObject11.ChildList	Custom Objects 11
Attendee Call	CustomObject12.ChildList	Custom Objects 12
Attendee Call	CustomObject13.ChildList	Custom Objects 13
Attendee Call	CustomObject14.ChildList	Custom Objects 14
Attendee Call	CustomObject15.ChildList	Custom Objects 15
Attendee Call	CustomObject4.ChildList	Custom Objects 04
Attendee Call	CustomObject5.ChildList	Custom Objects 05
Attendee Call	CustomObject6.ChildList	Custom Objects 06
Attendee Call	CustomObject7.ChildList	Custom Objects 07
Attendee Call	CustomObject8.ChildList	Custom Objects 08
Attendee Call	CustomObject9.ChildList	Custom Objects 09

Object System Name	Child Applet Id	Child Applet Name
Attendee Call	Fund Request.ChildList	Fund Requests
Attendee Call	Order.ChildList	Orders
Attendee Call	SampleRequest.ChildList	Sample Requests
BlockedProduct	Audit Trail.ChildList	Audit Trail
BrokerProfile	Audit Trail.ChildList	Audit Trail
BrokerProfile	Custom Object 1.ChildList	Custom Objects 01
BrokerProfile	Custom Object 2.ChildList	Custom Objects 02
BrokerProfile	Custom Object 3.ChildList	Custom Objects 03
BrokerProfile	CustomObject10.ChildList	Custom Objects 10
BrokerProfile	CustomObject11.ChildList	Custom Objects 11
BrokerProfile	CustomObject12.ChildList	Custom Objects 12
BrokerProfile	CustomObject13.ChildList	Custom Objects 13
BrokerProfile	CustomObject14.ChildList	Custom Objects 14
BrokerProfile	CustomObject15.ChildList	Custom Objects 15
BrokerProfile	CustomObject4.ChildList	Custom Objects 04
BrokerProfile	CustomObject5.ChildList	Custom Objects 05
BrokerProfile	CustomObject6.ChildList	Custom Objects 06
BrokerProfile	CustomObject7.ChildList	Custom Objects 07
BrokerProfile	CustomObject8.ChildList	Custom Objects 08
BrokerProfile	CustomObject9.ChildList	Custom Objects 09
Campaign	ActivityClosedChildList	Completed Activities

Object System Name	Child Applet Id	Child Applet Name
Campaign	ActivityOpenChildList	Open Activities
Campaign	Application.ChildList	Applications
Campaign	AppointmentOpenChildList	Open Appointments
Campaign	Audit Trail.ChildList	Audit Trail
Campaign	Campaign Book.ChildList	Books
Campaign	CampaignContChildList	Recipients
Campaign	CampaignFACChildList	Attachments
Campaign	CampaignNoteChildList	Notes
Campaign	CustObj1ChildList	Custom Objects 01
Campaign	CustObj2ChildList	Custom Objects 02
Campaign	CustObj3ChildList	Custom Objects 03
Campaign	CustomObject10.ChildList	Custom Objects 10
Campaign	CustomObject11.ChildList	Custom Objects 11
Campaign	CustomObject12.ChildList	Custom Objects 12
Campaign	CustomObject13.ChildList	Custom Objects 13
Campaign	CustomObject14.ChildList	Custom Objects 14
Campaign	CustomObject15.ChildList	Custom Objects 15
Campaign	CustomObject4.ChildList	Custom Objects 04
Campaign	CustomObject5.ChildList	Custom Objects 05
Campaign	CustomObject6.ChildList	Custom Objects 06
Campaign	CustomObject7.ChildList	Custom Objects 07

Object System Name	Child Applet Id	Child Applet Name
Campaign	CustomObject8.ChildList	Custom Objects 08
Campaign	CustomObject9.ChildList	Custom Objects 09
Campaign	FinancialAccount.ChildList	Financial Accounts
Campaign	FinancialPlan.ChildList	Financial Plans
Campaign	LeadChildList	Leads
Campaign	MDFRequest.ChildList	MDF Requests
Campaign	MedEdEvent.ChildList	Events
Campaign	OptyChildList	Opportunities
Campaign	PartnerCampaign.ChildList	Partner Campaigns
Campaign	Policy.ChildList	Policies
Campaign	TaskOpenChildList	Open Tasks
Certification	AccreditationCertification.ChildList	Accreditation Certifications
Certification	Audit Trail.ChildList	Audit Trail
Certification	Certification Book.ChildList	Books
Certification	CertificationAttachment.ChildList	Certification Attachments
Certification	CertificationCourse.ChildList	Certification Courses
Certification	CertificationExam.ChildList	Certification Exams
Certification	CertificationProduct.ChildList	Certification Products
Certification	CertificationProductCategory.ChildList	Certification Product Product Categories
Certification	CertificationRelationship.ChildList	Related Certifications

Object System Name	Child Applet Id	Child Applet Name
Certification	CertificationRequest.ChildList	Certification Requests
Certification	CertificationSolution.ChildList	Certification Solutions
Certification	CertificationTeam.ChildList	Certification Teams
Certification	Custom Object 1.ChildList	Custom Objects 01
Certification	Custom Object 2.ChildList	Custom Objects 02
Certification	Custom Object 3.ChildList	Custom Objects 03
Certification	CustomObject10.ChildList	Custom Objects 10
Certification	CustomObject11.ChildList	Custom Objects 11
Certification	CustomObject12.ChildList	Custom Objects 12
Certification	CustomObject13.ChildList	Custom Objects 13
Certification	CustomObject14.ChildList	Custom Objects 14
Certification	CustomObject15.ChildList	Custom Objects 15
Certification	CustomObject4.ChildList	Custom Objects 04
Certification	CustomObject5.ChildList	Custom Objects 05
Certification	CustomObject6.ChildList	Custom Objects 06
Certification	CustomObject7.ChildList	Custom Objects 07
Certification	CustomObject8.ChildList	Custom Objects 08
Certification	CustomObject9.ChildList	Custom Objects 09
Channel Partner	ActivityClosedChildList	Completed Activities
Channel Partner	ActivityOpenChildList	Open Activities
Channel Partner	AppointmentOpenChildList	Open Appointments

Object System Name	Child Applet Id	Child Applet Name
Channel Partner	Audit Trail.ChildList	Audit Trail
Channel Partner	ChannelPartnerTerritoryChildList	Territories
Channel Partner	CustObj1ChildList	Custom Objects 01
Channel Partner	CustObj2ChildList	Custom Objects 02
Channel Partner	CustObj3ChildList	Custom Objects 03
Channel Partner	CustomObject10.ChildList	Custom Objects 10
Channel Partner	CustomObject11.ChildList	Custom Objects 11
Channel Partner	CustomObject12.ChildList	Custom Objects 12
Channel Partner	CustomObject13.ChildList	Custom Objects 13
Channel Partner	CustomObject14.ChildList	Custom Objects 14
Channel Partner	CustomObject15.ChildList	Custom Objects 15
Channel Partner	CustomObject4.ChildList	Custom Objects 04
Channel Partner	CustomObject5.ChildList	Custom Objects 05
Channel Partner	CustomObject6.ChildList	Custom Objects 06
Channel Partner	CustomObject7.ChildList	Custom Objects 07
Channel Partner	CustomObject8.ChildList	Custom Objects 08
Channel Partner	CustomObject9.ChildList	Custom Objects 09
Channel Partner	DealerAddress.ChildList	Addresses
Channel Partner	DealerBookChildList	Books
Channel Partner	DealerContactChildList	Contacts
Channel Partner	DealerFACHildList	Attachments



Object System Name	Child Applet Id	Child Applet Name
Channel Partner	DealerNoteChildList	Notes
Channel Partner	DealerSalesHoursChildList	Sales Hours
Channel Partner	DealerSalesServiceMakeList	Makes
Channel Partner	DealerServiceHoursChildList	Service Hours
Channel Partner	DealerVehicleChildList	Vehicles
Channel Partner	OptyNoDelChildList	Opportunities
Channel Partner	SRChildList	Service Requests
Channel Partner	TaskOpenChildList	Open Tasks
Claim	Activity.ChildList	Activities
Claim	ActivityClosedChildList	Completed Activities
Claim	AppointmentOpenChildList	Open Appointments
Claim	Audit Trail.ChildList	Audit Trail
Claim	Damage.ChildList	Damages
Claim	InvolvedParty.ChildList	Involved Parties
Claim	Service Request.ChildList	Service Requests
Claim	TaskOpenChildList	Open Tasks
CODActChatDetail	Activity Book.ChildList	Books
CODActChatDetail	Audit Trail.ChildList	Audit Trail
CODActChatDetail	CODActChatFACHildList	Attachments
CODActChatDetail	CODContactChildList	Contacts
CODActChatDetail	CRMOD_LS_Transactions.ChildList	Sample Transactions

Object System Name	Child Applet Id	Child Applet Name
CODActChatDetail	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODActChatDetail	CRMODLS_Signature.ChildList	Signature
CODActChatDetail	CustomObject10.ChildList	Custom Objects 10
CODActChatDetail	CustomObject11.ChildList	Custom Objects 11
CODActChatDetail	CustomObject12.ChildList	Custom Objects 12
CODActChatDetail	CustomObject13.ChildList	Custom Objects 13
CODActChatDetail	CustomObject14.ChildList	Custom Objects 14
CODActChatDetail	CustomObject15.ChildList	Custom Objects 15
CODActChatDetail	CustomObject4.ChildList	Custom Objects 04
CODActChatDetail	CustomObject5.ChildList	Custom Objects 05
CODActChatDetail	CustomObject6.ChildList	Custom Objects 06
CODActChatDetail	CustomObject7.ChildList	Custom Objects 07
CODActChatDetail	CustomObject8.ChildList	Custom Objects 08
CODActChatDetail	CustomObject9.ChildList	Custom Objects 09
CODActChatDetail	Fund Request.ChildList	Fund Requests
CODActChatDetail	Order.ChildList	Orders
CODActChatDetail	SampleRequest.ChildList	Sample Requests
CODActEmailDetail	Activity Book.ChildList	Books
CODActEmailDetail	Audit Trail.ChildList	Audit Trail
CODActEmailDetail	CODActEmailFACHildList	Attachments
CODActEmailDetail	CODContactChildList	Contacts

Object System Name	Child Applet Id	Child Applet Name
CODActEmailDetail	CRMOD_LS_Transactions.ChildList	Sample Transactions
CODActEmailDetail	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODActEmailDetail	CRMODLS_Signature.ChildList	Signature
CODActEmailDetail	CustomObject10.ChildList	Custom Objects 10
CODActEmailDetail	CustomObject11.ChildList	Custom Objects 11
CODActEmailDetail	CustomObject12.ChildList	Custom Objects 12
CODActEmailDetail	CustomObject13.ChildList	Custom Objects 13
CODActEmailDetail	CustomObject14.ChildList	Custom Objects 14
CODActEmailDetail	CustomObject15.ChildList	Custom Objects 15
CODActEmailDetail	CustomObject4.ChildList	Custom Objects 04
CODActEmailDetail	CustomObject5.ChildList	Custom Objects 05
CODActEmailDetail	CustomObject6.ChildList	Custom Objects 06
CODActEmailDetail	CustomObject7.ChildList	Custom Objects 07
CODActEmailDetail	CustomObject8.ChildList	Custom Objects 08
CODActEmailDetail	CustomObject9.ChildList	Custom Objects 09
CODActEmailDetail	Fund Request.ChildList	Fund Requests
CODActEmailDetail	Order.ChildList	Orders
CODActEmailDetail	SampleRequest.ChildList	Sample Requests
CODActVMDetail	Activity Book.ChildList	Books
CODActVMDetail	Audit Trail.ChildList	Audit Trail
CODActVMDetail	CODActVMFACHildList	Attachments

Object System Name	Child Applet Id	Child Applet Name
CODActVMDetail	CODContactChildList	Contacts
CODActVMDetail	CRMOD_LS_Transactions.ChildList	Sample Transactions
CODActVMDetail	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODActVMDetail	CRMODLS_Signature.ChildList	Signature
CODActVMDetail	CustomObject10.ChildList	Custom Objects 10
CODActVMDetail	CustomObject11.ChildList	Custom Objects 11
CODActVMDetail	CustomObject12.ChildList	Custom Objects 12
CODActVMDetail	CustomObject13.ChildList	Custom Objects 13
CODActVMDetail	CustomObject14.ChildList	Custom Objects 14
CODActVMDetail	CustomObject15.ChildList	Custom Objects 15
CODActVMDetail	CustomObject4.ChildList	Custom Objects 04
CODActVMDetail	CustomObject5.ChildList	Custom Objects 05
CODActVMDetail	CustomObject6.ChildList	Custom Objects 06
CODActVMDetail	CustomObject7.ChildList	Custom Objects 07
CODActVMDetail	CustomObject8.ChildList	Custom Objects 08
CODActVMDetail	CustomObject9.ChildList	Custom Objects 09
CODActVMDetail	Fund Request.ChildList	Fund Requests
CODActVMDetail	Order.ChildList	Orders
CODActVMDetail	SampleRequest.ChildList	Sample Requests
CODActVoiceDetail	Activity Book.ChildList	Books
CODActVoiceDetail	Audit Trail.ChildList	Audit Trail

Object System Name	Child Applet Id	Child Applet Name
CODActVoiceDetail	CODActVoiceFACChildList	Attachments
CODActVoiceDetail	CODContactChildList	Contacts
CODActVoiceDetail	CRMOD_LS_Transactions.ChildList	Sample Transactions
CODActVoiceDetail	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODActVoiceDetail	CRMODLS_Signature.ChildList	Signature
CODActVoiceDetail	CustomObject10.ChildList	Custom Objects 10
CODActVoiceDetail	CustomObject11.ChildList	Custom Objects 11
CODActVoiceDetail	CustomObject12.ChildList	Custom Objects 12
CODActVoiceDetail	CustomObject13.ChildList	Custom Objects 13
CODActVoiceDetail	CustomObject14.ChildList	Custom Objects 14
CODActVoiceDetail	CustomObject15.ChildList	Custom Objects 15
CODActVoiceDetail	CustomObject4.ChildList	Custom Objects 04
CODActVoiceDetail	CustomObject5.ChildList	Custom Objects 05
CODActVoiceDetail	CustomObject6.ChildList	Custom Objects 06
CODActVoiceDetail	CustomObject7.ChildList	Custom Objects 07
CODActVoiceDetail	CustomObject8.ChildList	Custom Objects 08
CODActVoiceDetail	CustomObject9.ChildList	Custom Objects 09
CODActVoiceDetail	Fund Request.ChildList	Fund Requests
CODActVoiceDetail	Order.ChildList	Orders
CODActVoiceDetail	SampleRequest.ChildList	Sample Requests
CODWrapUp	Activity Book.ChildList	Books

Object System Name	Child Applet Id	Child Applet Name
CODWrapUp	Audit Trail.ChildList	Audit Trail
CODWrapUp	CRMOD_LS_Transactions.ChildList	Sample Transactions
CODWrapUp	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CODWrapUp	CRMODLS_Signature.ChildList	Signature
CODWrapUp	CustomObject10.ChildList	Custom Objects 10
CODWrapUp	CustomObject11.ChildList	Custom Objects 11
CODWrapUp	CustomObject12.ChildList	Custom Objects 12
CODWrapUp	CustomObject13.ChildList	Custom Objects 13
CODWrapUp	CustomObject14.ChildList	Custom Objects 14
CODWrapUp	CustomObject15.ChildList	Custom Objects 15
CODWrapUp	CustomObject4.ChildList	Custom Objects 04
CODWrapUp	CustomObject5.ChildList	Custom Objects 05
CODWrapUp	CustomObject6.ChildList	Custom Objects 06
CODWrapUp	CustomObject7.ChildList	Custom Objects 07
CODWrapUp	CustomObject8.ChildList	Custom Objects 08
CODWrapUp	CustomObject9.ChildList	Custom Objects 09
CODWrapUp	Fund Request.ChildList	Fund Requests
CODWrapUp	Order.ChildList	Orders
CODWrapUp	SampleRequest.ChildList	Sample Requests
Contact	Accreditation.ChildList	Accreditations
Contact	ActivityClosedChildList	Completed Activities

Object System Name	Child Applet Id	Child Applet Name
Contact	ActivityOpenChildList	Open Activities
Contact	AppointmentOpenChildList	Open Appointments
Contact	Audit Trail.ChildList	Audit Trail
Contact	BlockedProduct.ChildList	Blocked Products
Contact	CallActivityHistory.ChildList	Call Activity History
Contact	Certification.ChildList	Certifications
Contact	CertificationRequest.ChildList	Certification Requests
Contact	Claim.ChildList	Claims
Contact	ContactAccountChildList	Accounts
Contact	ContactAddressChildList	Addresses
Contact	ContactAssetChild	Assets
Contact	ContactBestTimes.ChildList	Contact Best Times
Contact	ContactBookChildList	Books
Contact	ContactCallChildList	Calls
Contact	ContactCampChildList	Campaigns
Contact	ContactCustSatSurveyChildList	Customer Satisfaction Surveys
Contact	ContactFACHildList	Attachments
Contact	ContactHouseholdChildList	Household
Contact	ContactInterestChildList	Contact Interests
Contact	ContactNoteChildList	Notes
Contact	ContactPortfolioChildList	Portfolio

Object System Name	Child Applet Id	Child Applet Name
Contact	ContactRelationshipList	Contact Relationships
Contact	ContactTeamChildList	Contact Team
Contact	Course.ChildList	Courses
Contact	CourseEnrollment.ChildList	Course Enrollments
Contact	Coverage.ChildList	Coverages
Contact	CRMOD_LS_ContactLicenses.ChildList	Contact State Licenses
Contact	CRMOD_LS_Transactions.ChildList	Sample Transactions
Contact	CRMODLS_BPL_CNTCT.ChildList	Plan Contacts
Contact	CRMODLS_OBJECTIVE.ChildList	Objectives
Contact	CRMODLS_Signature.ChildList	Signature
Contact	CustObj1ChildList	Custom Objects 01
Contact	CustObj2ChildList	Custom Objects 02
Contact	CustObj3ChildList	Custom Objects 03
Contact	CustomObject10.ChildList	Custom Objects 10
Contact	CustomObject11.ChildList	Custom Objects 11
Contact	CustomObject12.ChildList	Custom Objects 12
Contact	CustomObject13.ChildList	Custom Objects 13
Contact	CustomObject14.ChildList	Custom Objects 14
Contact	CustomObject15.ChildList	Custom Objects 15
Contact	CustomObject4.ChildList	Custom Objects 04
Contact	CustomObject5.ChildList	Custom Objects 05



Object System Name	Child Applet Id	Child Applet Name
Contact	CustomObject6.ChildList	Custom Objects 06
Contact	CustomObject7.ChildList	Custom Objects 07
Contact	CustomObject8.ChildList	Custom Objects 08
Contact	CustomObject9.ChildList	Custom Objects 09
Contact	DealerVehicleChildList	Vehicles
Contact	DealRegistration.ChildList	Deal Registrations
Contact	Exam.ChildList	Exams
Contact	ExamRegistration.ChildList	Exam Registrations
Contact	FinancialAccount.Account_Holder.ChildList	Financial Account: Account Holder
Contact	FinancialAccount.ChildList	Financial Accounts
Contact	FinancialAccountHolder.ChildList	Financial Account Holders
Contact	FinancialPlan.ChildList	Financial Plans
Contact	HCPContactAllocation.ChildList	HCP Contact Allocations
Contact	InvolvedParty.ChildList	Involved Parties
Contact	LeadChildList	Leads
Contact	MedEdChildList	Event
Contact	OptyContactChildList	Opportunities
Contact	Order.ChildList	Orders
Contact	Policy.Carrier_Underwriter.ChildList	Policy: Carrier Underwriter
Contact	Policy.ChildList	Policies
Contact	PolicyHolder.ChildList	Policy Holders

Object System Name	Child Applet Id	Child Applet Name
Contact	ReferralChildList	Referrals
Contact	RevenueChildList	Revenues
Contact	SampleRequest.ChildList	Sample Requests
Contact	SocialProfile.ChildList	Social Profiles
Contact	SRChildList	Service Requests
Contact	TaskOpenChildList	Open Tasks
Contact Call	ActionContactChildList	Contacts
Contact Call	ActionFACChildList	Attachments
Contact Call	ActionUserChildList	Users
Contact Call	Activity Book.ChildList	Books
Contact Call	ActivityAssessmentChildList	Activity Assessments
Contact Call	Audit Trail.ChildList	Audit Trail
Contact Call	CallsMessagePlanVBCChildList	Available Message Plans
Contact Call	CallsProdDetailChildList	Products Detailed
Contact Call	CallsProdDetailVBCChildList	Available Products for Detailing
Contact Call	CallsPromItemDropChildList	Promotional Items
Contact Call	CallsPromItemDropVBCChildList	Available Promotional Items for Drop
Contact Call	CallsSampDropChildList	Samples Dropped
Contact Call	CallsSampDropVBCChildList	Available Samples for Drop
Contact Call	ContactBestTimes.ChildList	Contact Best Times

Object System Name	Child Applet Id	Child Applet Name
Contact Call	CRMOD_LS_Transactions.ChildList	Sample Transactions
Contact Call	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Contact Call	CRMODLS_Signature.ChildList	Signature
Contact Call	CustObj1ChildList	Custom Objects 01
Contact Call	CustObj2ChildList	Custom Objects 02
Contact Call	CustObj3ChildList	Custom Objects 03
Contact Call	CustomObject10.ChildList	Custom Objects 10
Contact Call	CustomObject11.ChildList	Custom Objects 11
Contact Call	CustomObject12.ChildList	Custom Objects 12
Contact Call	CustomObject13.ChildList	Custom Objects 13
Contact Call	CustomObject14.ChildList	Custom Objects 14
Contact Call	CustomObject15.ChildList	Custom Objects 15
Contact Call	CustomObject4.ChildList	Custom Objects 04
Contact Call	CustomObject5.ChildList	Custom Objects 05
Contact Call	CustomObject6.ChildList	Custom Objects 06
Contact Call	CustomObject7.ChildList	Custom Objects 07
Contact Call	CustomObject8.ChildList	Custom Objects 08
Contact Call	CustomObject9.ChildList	Custom Objects 09
Contact Call	Fund Request.ChildList	Fund Requests
Contact Call	MedEdSolutionChildList	Solutions
Contact Call	Order.ChildList	Orders

Object System Name	Child Applet Id	Child Applet Name
Contact Call	SampleRequest.ChildList	Sample Requests
Course	Audit Trail.ChildList	Audit Trail
Course	CertificationCourse.ChildList	Certification Courses
Course	Course Book.ChildList	Books
Course	CourseAttachment.ChildList	Course Attachments
Course	CourseCategory.ChildList	Course Product Product Categories
Course	CourseEnrollment.ChildList	Course Enrollments
Course	CourseExam.ChildList	Course Exams
Course	CoursePartner.ChildList	Course Partners
Course	CourseProduct.ChildList	Course Products
Course	CourseRelationship.ChildList	Related Courses
Course	CourseSolution.ChildList	Course Solutions
Course	CourseTeam.ChildList	Course Teams
Course	Custom Object 1.ChildList	Custom Objects 01
Course	Custom Object 2.ChildList	Custom Objects 02
Course	Custom Object 3.ChildList	Custom Objects 03
Course	CustomObject10.ChildList	Custom Objects 10
Course	CustomObject11.ChildList	Custom Objects 11
Course	CustomObject12.ChildList	Custom Objects 12
Course	CustomObject13.ChildList	Custom Objects 13
Course	CustomObject14.ChildList	Custom Objects 14

Object System Name	Child Applet Id	Child Applet Name
Course	CustomObject15.ChildList	Custom Objects 15
Course	CustomObject4.ChildList	Custom Objects 04
Course	CustomObject5.ChildList	Custom Objects 05
Course	CustomObject6.ChildList	Custom Objects 06
Course	CustomObject7.ChildList	Custom Objects 07
Course	CustomObject8.ChildList	Custom Objects 08
Course	CustomObject9.ChildList	Custom Objects 09
Coverage	Audit Trail.ChildList	Audit Trail
CRMOD_LS_Allocation	Audit Trail.ChildList	Audit Trail
CRMOD_LS_Allocation	CRMOD_LS_Allocation Book.ChildList	Books
CRMOD_LS_ContactLicenses	Audit Trail.ChildList	Audit Trail
CRMOD_LS_MessagingPlan	Audit Trail.ChildList	Audit Trail
CRMOD_LS_MessagingPlan	CRMOD_LS_MessagingPlan Book.ChildList	Books
CRMOD_LS_MessagingPlan	CRMOD_LS_MsgPlanItem.ChildList	Messaging Plan Items
CRMOD_LS_MessagingPlan	CRMODLS_BusinessPlan.ChildList	Business Plans
CRMOD_LS_MessagingPlan	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CRMOD_LS_MessagingPlan	Custom Object 1.ChildList	Custom Objects 01
CRMOD_LS_MessagingPlan	Custom Object 2.ChildList	Custom Objects 02
CRMOD_LS_MessagingPlan	Custom Object 3.ChildList	Custom Objects 03
CRMOD_LS_MessagingPlan	CustomObject10.ChildList	Custom Objects 10
CRMOD_LS_MessagingPlan	CustomObject11.ChildList	Custom Objects 11

Object System Name	Child Applet Id	Child Applet Name
CRMOD_LS_MessagingPlan	CustomObject12.ChildList	Custom Objects 12
CRMOD_LS_MessagingPlan	CustomObject13.ChildList	Custom Objects 13
CRMOD_LS_MessagingPlan	CustomObject14.ChildList	Custom Objects 14
CRMOD_LS_MessagingPlan	CustomObject15.ChildList	Custom Objects 15
CRMOD_LS_MessagingPlan	CustomObject4.ChildList	Custom Objects 04
CRMOD_LS_MessagingPlan	CustomObject5.ChildList	Custom Objects 05
CRMOD_LS_MessagingPlan	CustomObject6.ChildList	Custom Objects 06
CRMOD_LS_MessagingPlan	CustomObject7.ChildList	Custom Objects 07
CRMOD_LS_MessagingPlan	CustomObject8.ChildList	Custom Objects 08
CRMOD_LS_MessagingPlan	CustomObject9.ChildList	Custom Objects 09
CRMOD_LS_MsgPlanItem	Audit Trail.ChildList	Audit Trail
CRMOD_LS_MsgPlanItem	CallProdDetail_MsgPlanItem.ChildList	Call Product Detail Messaging Plan Items
CRMOD_LS_MsgPlanItem	CRMOD_LS_MsgPlnRel.ChildList	Messaging Plan Item Relations
CRMOD_LS_MsgPlanItem	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
CRMOD_LS_MsgPlanItem	Custom Object 1.ChildList	Custom Objects 01
CRMOD_LS_MsgPlanItem	Custom Object 2.ChildList	Custom Objects 02
CRMOD_LS_MsgPlanItem	Custom Object 3.ChildList	Custom Objects 03
CRMOD_LS_MsgPlanItem	CustomObject10.ChildList	Custom Objects 10
CRMOD_LS_MsgPlanItem	CustomObject11.ChildList	Custom Objects 11
CRMOD_LS_MsgPlanItem	CustomObject12.ChildList	Custom Objects 12

Object System Name	Child Applet Id	Child Applet Name
CRMOD_LS_MsgPlanItem	CustomObject13.ChildList	Custom Objects 13
CRMOD_LS_MsgPlanItem	CustomObject14.ChildList	Custom Objects 14
CRMOD_LS_MsgPlanItem	CustomObject15.ChildList	Custom Objects 15
CRMOD_LS_MsgPlanItem	CustomObject4.ChildList	Custom Objects 04
CRMOD_LS_MsgPlanItem	CustomObject5.ChildList	Custom Objects 05
CRMOD_LS_MsgPlanItem	CustomObject6.ChildList	Custom Objects 06
CRMOD_LS_MsgPlanItem	CustomObject7.ChildList	Custom Objects 07
CRMOD_LS_MsgPlanItem	CustomObject8.ChildList	Custom Objects 08
CRMOD_LS_MsgPlanItem	CustomObject9.ChildList	Custom Objects 09
CRMOD_LS_MsgPlnRel	Audit Trail.ChildList	Audit Trail
CRMOD_LS_MsgPlnRel	CallProdDetail_MsgPlnRel.ChildList	Call Product Detail Messaging Plan Item Relations
CRMOD_LS_MsgPlnRel	Custom Object 1.ChildList	Custom Objects 01
CRMOD_LS_MsgPlnRel	Custom Object 2.ChildList	Custom Objects 02
CRMOD_LS_MsgPlnRel	Custom Object 3.ChildList	Custom Objects 03
CRMOD_LS_MsgPlnRel	CustomObject10.ChildList	Custom Objects 10
CRMOD_LS_MsgPlnRel	CustomObject11.ChildList	Custom Objects 11
CRMOD_LS_MsgPlnRel	CustomObject12.ChildList	Custom Objects 12
CRMOD_LS_MsgPlnRel	CustomObject13.ChildList	Custom Objects 13
CRMOD_LS_MsgPlnRel	CustomObject14.ChildList	Custom Objects 14
CRMOD_LS_MsgPlnRel	CustomObject15.ChildList	Custom Objects 15
CRMOD_LS_MsgPlnRel	CustomObject4.ChildList	Custom Objects 04

Object System Name	Child Applet Id	Child Applet Name
CRMOD_LS_MsgPlnRel	CustomObject5.ChildList	Custom Objects 05
CRMOD_LS_MsgPlnRel	CustomObject6.ChildList	Custom Objects 06
CRMOD_LS_MsgPlnRel	CustomObject7.ChildList	Custom Objects 07
CRMOD_LS_MsgPlnRel	CustomObject8.ChildList	Custom Objects 08
CRMOD_LS_MsgPlnRel	CustomObject9.ChildList	Custom Objects 09
CRMOD_LS_Transactions	Audit Trail.ChildList	Audit Trail
CRMOD_LS_Transactions	CRMOD_LS_TransactionItems.ChildList	Transaction Items
CRMOD_LS_Transactions	CRMOD_LS_Transactions Book.ChildList	Books
CRMOD_LS_Transactions	Custom Object 1.ChildList	Custom Objects 01
CRMOD_LS_Transactions	Custom Object 2.ChildList	Custom Objects 02
CRMOD_LS_Transactions	Custom Object 3.ChildList	Custom Objects 03
CRMOD_LS_Transactions	CustomObject10.ChildList	Custom Objects 10
CRMOD_LS_Transactions	CustomObject11.ChildList	Custom Objects 11
CRMOD_LS_Transactions	CustomObject12.ChildList	Custom Objects 12
CRMOD_LS_Transactions	CustomObject13.ChildList	Custom Objects 13
CRMOD_LS_Transactions	CustomObject14.ChildList	Custom Objects 14
CRMOD_LS_Transactions	CustomObject15.ChildList	Custom Objects 15
CRMOD_LS_Transactions	CustomObject4.ChildList	Custom Objects 04
CRMOD_LS_Transactions	CustomObject5.ChildList	Custom Objects 05
CRMOD_LS_Transactions	CustomObject6.ChildList	Custom Objects 06
CRMOD_LS_Transactions	CustomObject7.ChildList	Custom Objects 07



Object System Name	Child Applet Id	Child Applet Name
CRMOD_LS_Transactions	CustomObject8.ChildList	Custom Objects 08
CRMOD_LS_Transactions	CustomObject9.ChildList	Custom Objects 09
CRMODLS_BPL_ACNT	Audit Trail.ChildList	Audit Trail
CRMODLS_BPL_CNTCT	Audit Trail.ChildList	Audit Trail
CRMODLS_BusinessPlan	AccreditationRequest.ChildList	Accreditation Requests
CRMODLS_BusinessPlan	Activity.ChildList	Activities
CRMODLS_BusinessPlan	ActivityClosedChildList	Completed Activities
CRMODLS_BusinessPlan	AppointmentOpenChildList	Open Appointments
CRMODLS_BusinessPlan	Audit Trail.ChildList	Audit Trail
CRMODLS_BusinessPlan	BusinessPlanAssessmentChildList	Business Plan Assessment
CRMODLS_BusinessPlan	CertificationRequest.ChildList	Certification Requests
CRMODLS_BusinessPlan	CRMOD_LS_MessagingPlan.ChildList	Messaging Plans
CRMODLS_BusinessPlan	CRMODLS_BPL_ACNT.ChildList	Plan Accounts
CRMODLS_BusinessPlan	CRMODLS_BPL_CNTCT.ChildList	Plan Contacts
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan Book.ChildList	Books
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan.SelfChildList	Business Plans
CRMODLS_BusinessPlan	CRMODLS_BusinessPlan_ATTACHMENT.ChildList	Business Plan Attachments
CRMODLS_BusinessPlan	CRMODLS_BusinessPlanTeam.ChildList	Business Plan Teams
CRMODLS_BusinessPlan	CRMODLS_OBJECTIVE.ChildList	Objectives
CRMODLS_BusinessPlan	CRMODLS_PlanOpportunities.ChildList	Plan Opportunities
CRMODLS_BusinessPlan	Custom Object 1.ChildList	Custom Objects 01

Object System Name	Child Applet Id	Child Applet Name
CRMODLS_BusinessPlan	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_BusinessPlan	Custom Object 3.ChildList	Custom Objects 03
CRMODLS_BusinessPlan	CustomObject10.ChildList	Custom Objects 10
CRMODLS_BusinessPlan	CustomObject11.ChildList	Custom Objects 11
CRMODLS_BusinessPlan	CustomObject12.ChildList	Custom Objects 12
CRMODLS_BusinessPlan	CustomObject13.ChildList	Custom Objects 13
CRMODLS_BusinessPlan	CustomObject14.ChildList	Custom Objects 14
CRMODLS_BusinessPlan	CustomObject15.ChildList	Custom Objects 15
CRMODLS_BusinessPlan	CustomObject4.ChildList	Custom Objects 04
CRMODLS_BusinessPlan	CustomObject5.ChildList	Custom Objects 05
CRMODLS_BusinessPlan	CustomObject6.ChildList	Custom Objects 06
CRMODLS_BusinessPlan	CustomObject7.ChildList	Custom Objects 07
CRMODLS_BusinessPlan	CustomObject8.ChildList	Custom Objects 08
CRMODLS_BusinessPlan	CustomObject9.ChildList	Custom Objects 09
CRMODLS_BusinessPlan	MedEdEvent.ChildList	Events
CRMODLS_BusinessPlan	PartnerPlan.ChildList	Partner Plans
CRMODLS_BusinessPlan	TaskOpenChildList	Open Tasks
CRMODLS_InventoryAuditReport	Audit Trail.ChildList	Audit Trail
CRMODLS_InventoryAuditReport	CRMODLS_InventoryAuditReport Book.ChildList	Books
CRMODLS_InventoryAuditReport	CRMODLS_SampleInventory.ChildList	Sample Inventory
CRMODLS_InventoryPeriod	Audit Trail.ChildList	Audit Trail

Object System Name	Child Applet Id	Child Applet Name
CRMODLS_InventoryPeriod	CRMOD_LS_Transactions.ChildList	Sample Transactions
CRMODLS_InventoryPeriod	CRMODLS_InventoryAuditReport.ChildList	Inventory Audit Reports
CRMODLS_InventoryPeriod	CRMODLS_InventoryPeriod Book.ChildList	Books
CRMODLS_InventoryPeriod	CRMODLS_SampleInventory.ChildList	Sample Inventory
CRMODLS_InventoryPeriod	Custom Object 1.ChildList	Custom Objects 01
CRMODLS_InventoryPeriod	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_InventoryPeriod	Custom Object 3.ChildList	Custom Objects 03
CRMODLS_InventoryPeriod	CustomObject10.ChildList	Custom Objects 10
CRMODLS_InventoryPeriod	CustomObject11.ChildList	Custom Objects 11
CRMODLS_InventoryPeriod	CustomObject12.ChildList	Custom Objects 12
CRMODLS_InventoryPeriod	CustomObject13.ChildList	Custom Objects 13
CRMODLS_InventoryPeriod	CustomObject14.ChildList	Custom Objects 14
CRMODLS_InventoryPeriod	CustomObject15.ChildList	Custom Objects 15
CRMODLS_InventoryPeriod	CustomObject4.ChildList	Custom Objects 04
CRMODLS_InventoryPeriod	CustomObject5.ChildList	Custom Objects 05
CRMODLS_InventoryPeriod	CustomObject6.ChildList	Custom Objects 06
CRMODLS_InventoryPeriod	CustomObject7.ChildList	Custom Objects 07
CRMODLS_InventoryPeriod	CustomObject8.ChildList	Custom Objects 08
CRMODLS_InventoryPeriod	CustomObject9.ChildList	Custom Objects 09
CRMODLS_OBJECTIVE	Accreditation.ChildList	Accreditations
CRMODLS_OBJECTIVE	AccreditationRequest.ChildList	Accreditation Requests

Object System Name	Child Applet Id	Child Applet Name
CRMODLS_OBJECTIVE	Activity.ChildList	Activities
CRMODLS_OBJECTIVE	ActivityClosedChildList	Completed Activities
CRMODLS_OBJECTIVE	AppointmentOpenChildList	Open Appointments
CRMODLS_OBJECTIVE	Audit Trail.ChildList	Audit Trail
CRMODLS_OBJECTIVE	Certification.ChildList	Certifications
CRMODLS_OBJECTIVE	CertificationRequest.ChildList	Certification Requests
CRMODLS_OBJECTIVE	Course.ChildList	Courses
CRMODLS_OBJECTIVE	CourseEnrollment.ChildList	Course Enrollments
CRMODLS_OBJECTIVE	CRMOD_LS_MessagingPlan.ChildList	Messaging Plans
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE Book.ChildList	Books
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE.SelfChildList	Objectives
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVE_ATTACHMENT.ChildList	Objective Attachments
CRMODLS_OBJECTIVE	CRMODLS_OBJECTIVETeam.ChildList	Objective Teams
CRMODLS_OBJECTIVE	Custom Object 1.ChildList	Custom Objects 01
CRMODLS_OBJECTIVE	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_OBJECTIVE	Custom Object 3.ChildList	Custom Objects 03
CRMODLS_OBJECTIVE	CustomObject10.ChildList	Custom Objects 10
CRMODLS_OBJECTIVE	CustomObject11.ChildList	Custom Objects 11
CRMODLS_OBJECTIVE	CustomObject12.ChildList	Custom Objects 12
CRMODLS_OBJECTIVE	CustomObject13.ChildList	Custom Objects 13
CRMODLS_OBJECTIVE	CustomObject14.ChildList	Custom Objects 14

Object System Name	Child Applet Id	Child Applet Name
CRMODLS_OBJECTIVE	CustomObject15.ChildList	Custom Objects 15
CRMODLS_OBJECTIVE	CustomObject4.ChildList	Custom Objects 04
CRMODLS_OBJECTIVE	CustomObject5.ChildList	Custom Objects 05
CRMODLS_OBJECTIVE	CustomObject6.ChildList	Custom Objects 06
CRMODLS_OBJECTIVE	CustomObject7.ChildList	Custom Objects 07
CRMODLS_OBJECTIVE	CustomObject8.ChildList	Custom Objects 08
CRMODLS_OBJECTIVE	CustomObject9.ChildList	Custom Objects 09
CRMODLS_OBJECTIVE	DealRegistration.ChildList	Deal Registrations
CRMODLS_OBJECTIVE	Exam.ChildList	Exams
CRMODLS_OBJECTIVE	ExamRegistration.ChildList	Exam Registrations
CRMODLS_OBJECTIVE	Fund.ChildList	Funds
CRMODLS_OBJECTIVE	Lead.ChildList	Leads
CRMODLS_OBJECTIVE	MDFRequest.ChildList	MDF Requests
CRMODLS_OBJECTIVE	MedEdEvent.ChildList	Events
CRMODLS_OBJECTIVE	ObjectiveAssessmentChildList	Objective Assessment
CRMODLS_OBJECTIVE	Opportunity.ChildList	Opportunities
CRMODLS_OBJECTIVE	Service Request.ChildList	Service Requests
CRMODLS_OBJECTIVE	SPRequest.ChildList	Special Pricing Requests
CRMODLS_OBJECTIVE	TaskOpenChildList	Open Tasks
CRMODLS_PCD_MSGRSP	CallProdDetail_MsgRsp.ChildList	Call Product Detail Message Responses

Object System Name	Child Applet Id	Child Applet Name
CRMODLS_PCD_MSGRSP	Custom Object 1.ChildList	Custom Objects 01
CRMODLS_PCD_MSGRSP	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_PCD_MSGRSP	Custom Object 3.ChildList	Custom Objects 03
CRMODLS_PCD_MSGRSP	CustomObject10.ChildList	Custom Objects 10
CRMODLS_PCD_MSGRSP	CustomObject11.ChildList	Custom Objects 11
CRMODLS_PCD_MSGRSP	CustomObject12.ChildList	Custom Objects 12
CRMODLS_PCD_MSGRSP	CustomObject13.ChildList	Custom Objects 13
CRMODLS_PCD_MSGRSP	CustomObject14.ChildList	Custom Objects 14
CRMODLS_PCD_MSGRSP	CustomObject15.ChildList	Custom Objects 15
CRMODLS_PCD_MSGRSP	CustomObject4.ChildList	Custom Objects 04
CRMODLS_PCD_MSGRSP	CustomObject5.ChildList	Custom Objects 05
CRMODLS_PCD_MSGRSP	CustomObject6.ChildList	Custom Objects 06
CRMODLS_PCD_MSGRSP	CustomObject7.ChildList	Custom Objects 07
CRMODLS_PCD_MSGRSP	CustomObject8.ChildList	Custom Objects 08
CRMODLS_PCD_MSGRSP	CustomObject9.ChildList	Custom Objects 09
CRMODLS_PlanOpportunities	Audit Trail.ChildList	Audit Trail
CRMODLS_SampleLot	Audit Trail.ChildList	Audit Trail
CRMODLS_SampleLot	CRMODLS_SampleLot Book.ChildList	Books
CRMODLS_SampleLot	Custom Object 1.ChildList	Custom Objects 01
CRMODLS_SampleLot	Custom Object 2.ChildList	Custom Objects 02
CRMODLS_SampleLot	Custom Object 3.ChildList	Custom Objects 03

Object System Name	Child Applet Id	Child Applet Name
CRMODLS_SampleLot	CustomObject10.ChildList	Custom Objects 10
CRMODLS_SampleLot	CustomObject11.ChildList	Custom Objects 11
CRMODLS_SampleLot	CustomObject12.ChildList	Custom Objects 12
CRMODLS_SampleLot	CustomObject13.ChildList	Custom Objects 13
CRMODLS_SampleLot	CustomObject14.ChildList	Custom Objects 14
CRMODLS_SampleLot	CustomObject15.ChildList	Custom Objects 15
CRMODLS_SampleLot	CustomObject4.ChildList	Custom Objects 04
CRMODLS_SampleLot	CustomObject5.ChildList	Custom Objects 05
CRMODLS_SampleLot	CustomObject6.ChildList	Custom Objects 06
CRMODLS_SampleLot	CustomObject7.ChildList	Custom Objects 07
CRMODLS_SampleLot	CustomObject8.ChildList	Custom Objects 08
CRMODLS_SampleLot	CustomObject9.ChildList	Custom Objects 09
CRMODLS_Signature	Audit Trail.ChildList	Audit Trail
CRMODLS_SIGNDISC	Audit Trail.ChildList	Audit Trail
CRMODLS_SIGNDISC	CRMODLS_RELDISC.ChildList	Related Disclaimers
Custom Object 1	Accreditation.ChildList	Accreditations
Custom Object 1	ActivityClosedChildList	Completed Activities
Custom Object 1	ActivityOpenChildList	Open Activities
Custom Object 1	AppointmentOpenChildList	Open Appointments
Custom Object 1	AssetChildList	Assets
Custom Object 1	Audit Trail.ChildList	Audit Trail

Object System Name	Child Applet Id	Child Applet Name
Custom Object 1	Certification.ChildList	Certifications
Custom Object 1	Course.ChildList	Courses
Custom Object 1	CRMOD_LS_Transactions.ChildList	Sample Transactions
Custom Object 1	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
Custom Object 1	CRMODLS_SampleLot.ChildList	Sample Lots
Custom Object 1	CustObj1BookChildList	Books
Custom Object 1	CustObj1ChildList	Custom Objects 01
Custom Object 1	CustObj1FACHildList	Attachments
Custom Object 1	CustObj1NoteChildList	Notes
Custom Object 1	CustObj1TeamChildList	Custom Object 01 Team
Custom Object 1	CustObj2ChildList	Custom Objects 02
Custom Object 1	CustObj3ChildList	Custom Objects 03
Custom Object 1	CustObjAccountChildList	Accounts
Custom Object 1	CustObjCampaignChildList	Campaigns
Custom Object 1	CustObjContactChildList	Contacts
Custom Object 1	CustObjDealerChildList	Dealers
Custom Object 1	CustObjFundChildList	Funds
Custom Object 1	CustObjHouseholdChildList	Households
Custom Object 1	CustObjLeadChildList	Leads
Custom Object 1	CustObjMedEdChildList	Events
Custom Object 1	CustObjOpportunityChildList	Opportunities



Object System Name	Child Applet Id	Child Applet Name
Custom Object 1	CustObjPartnerChildList	Partners
Custom Object 1	CustObjPortfolioChildList	Portfolios
Custom Object 1	CustObjProductChildList	Products
Custom Object 1	CustObjSolutionChildList	Solutions
Custom Object 1	CustomObject10.ChildList	Custom Objects 10
Custom Object 1	CustomObject11.ChildList	Custom Objects 11
Custom Object 1	CustomObject12.ChildList	Custom Objects 12
Custom Object 1	CustomObject13.ChildList	Custom Objects 13
Custom Object 1	CustomObject14.ChildList	Custom Objects 14
Custom Object 1	CustomObject15.ChildList	Custom Objects 15
Custom Object 1	CustomObject4.ChildList	Custom Objects 04
Custom Object 1	CustomObject5.ChildList	Custom Objects 05
Custom Object 1	CustomObject6.ChildList	Custom Objects 06
Custom Object 1	CustomObject7.ChildList	Custom Objects 07
Custom Object 1	CustomObject8.ChildList	Custom Objects 08
Custom Object 1	CustomObject9.ChildList	Custom Objects 09
Custom Object 1	DealRegistration.ChildList	Deal Registrations
Custom Object 1	Exam.ChildList	Exams
Custom Object 1	FinancialAccount.ChildList	Financial Accounts
Custom Object 1	MDFRequest.ChildList	MDF Requests
Custom Object 1	Policy.ChildList	Policies

Object System Name	Child Applet Id	Child Applet Name
Custom Object 1	SPRequest.ChildList	Special Pricing Requests
Custom Object 1	SRChildList	Service Requests
Custom Object 1	TaskOpenChildList	Open Tasks
Custom Object 1	VehicleChildList	Vehicles
Custom Object 2	Accreditation.ChildList	Accreditations
Custom Object 2	ActivityClosedChildList	Completed Activities
Custom Object 2	ActivityOpenChildList	Open Activities
Custom Object 2	AppointmentOpenChildList	Open Appointments
Custom Object 2	AssetChildList	Assets
Custom Object 2	Audit Trail.ChildList	Audit Trail
Custom Object 2	Certification.ChildList	Certifications
Custom Object 2	Course.ChildList	Courses
Custom Object 2	CRMOD_LS_Transactions.ChildList	Sample Transactions
Custom Object 2	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
Custom Object 2	CRMODLS_SampleLot.ChildList	Sample Lots
Custom Object 2	CustObj1ChildList	Custom Objects 01
Custom Object 2	CustObj2BookChildList	Books
Custom Object 2	CustObj2ChildList	Custom Objects 02
Custom Object 2	CustObj2FACHildList	Attachments
Custom Object 2	CustObj2NoteChildList	Notes
Custom Object 2	CustObj2TeamChildList	Custom Object 02 Team

Object System Name	Child Applet Id	Child Applet Name
Custom Object 2	CustObj3ChildList	Custom Objects 03
Custom Object 2	CustObjAccountChildList	Accounts
Custom Object 2	CustObjCampaignChildList	Campaigns
Custom Object 2	CustObjContactChildList	Contacts
Custom Object 2	CustObjDealerChildList	Dealers
Custom Object 2	CustObjFundChildList	Funds
Custom Object 2	CustObjHouseholdChildList	Households
Custom Object 2	CustObjLeadChildList	Leads
Custom Object 2	CustObjMedEdChildList	Events
Custom Object 2	CustObjOpportunityChildList	Opportunities
Custom Object 2	CustObjPartnerChildList	Partners
Custom Object 2	CustObjPortfolioChildList	Portfolios
Custom Object 2	CustObjProductChildList	Products
Custom Object 2	CustObjSolutionChildList	Solutions
Custom Object 2	CustomObject10.ChildList	Custom Objects 10
Custom Object 2	CustomObject11.ChildList	Custom Objects 11
Custom Object 2	CustomObject12.ChildList	Custom Objects 12
Custom Object 2	CustomObject13.ChildList	Custom Objects 13
Custom Object 2	CustomObject14.ChildList	Custom Objects 14
Custom Object 2	CustomObject15.ChildList	Custom Objects 15
Custom Object 2	CustomObject4.ChildList	Custom Objects 04

Object System Name	Child Applet Id	Child Applet Name
Custom Object 2	CustomObject5.ChildList	Custom Objects 05
Custom Object 2	CustomObject6.ChildList	Custom Objects 06
Custom Object 2	CustomObject7.ChildList	Custom Objects 07
Custom Object 2	CustomObject8.ChildList	Custom Objects 08
Custom Object 2	CustomObject9.ChildList	Custom Objects 09
Custom Object 2	DealRegistration.ChildList	Deal Registrations
Custom Object 2	Exam.ChildList	Exams
Custom Object 2	FinancialAccount.ChildList	Financial Accounts
Custom Object 2	MDFRequest.ChildList	MDF Requests
Custom Object 2	Policy.ChildList	Policies
Custom Object 2	SPRequest.ChildList	Special Pricing Requests
Custom Object 2	SRChildList	Service Requests
Custom Object 2	TaskOpenChildList	Open Tasks
Custom Object 2	VehicleChildList	Vehicles
Custom Object 3	Accreditation.ChildList	Accreditations
Custom Object 3	ActivityClosedChildList	Completed Activities
Custom Object 3	ActivityOpenChildList	Open Activities
Custom Object 3	AppointmentOpenChildList	Open Appointments
Custom Object 3	AssetChildList	Assets
Custom Object 3	Audit Trail.ChildList	Audit Trail
Custom Object 3	Certification.ChildList	Certifications

Object System Name	Child Applet Id	Child Applet Name
Custom Object 3	Course.ChildList	Courses
Custom Object 3	CRMOD_LS_Transactions.ChildList	Sample Transactions
Custom Object 3	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
Custom Object 3	CRMODLS_SampleLot.ChildList	Sample Lots
Custom Object 3	CustObj1ChildList	Custom Objects 01
Custom Object 3	CustObj2ChildList	Custom Objects 02
Custom Object 3	CustObj3BookChildList	Books
Custom Object 3	CustObj3ChildList	Custom Objects 03
Custom Object 3	CustObj3FACHildList	Attachments
Custom Object 3	CustObj3NoteChildList	Notes
Custom Object 3	CustObj3TeamChildList	Custom Object 03 Team
Custom Object 3	CustObjAccountChildList	Accounts
Custom Object 3	CustObjCampaignChildList	Campaigns
Custom Object 3	CustObjContactChildList	Contacts
Custom Object 3	CustObjDealerChildList	Dealers
Custom Object 3	CustObjFundChildList	Funds
Custom Object 3	CustObjHouseholdChildList	Households
Custom Object 3	CustObjLeadChildList	Leads
Custom Object 3	CustObjMedEdChildList	Events
Custom Object 3	CustObjOpportunityChildList	Opportunities
Custom Object 3	CustObjPartnerChildList	Partners

Object System Name	Child Applet Id	Child Applet Name
Custom Object 3	CustObjPortfolioChildList	Portfolios
Custom Object 3	CustObjProductChildList	Products
Custom Object 3	CustObjSolutionChildList	Solutions
Custom Object 3	CustomObject10.ChildList	Custom Objects 10
Custom Object 3	CustomObject11.ChildList	Custom Objects 11
Custom Object 3	CustomObject12.ChildList	Custom Objects 12
Custom Object 3	CustomObject13.ChildList	Custom Objects 13
Custom Object 3	CustomObject14.ChildList	Custom Objects 14
Custom Object 3	CustomObject15.ChildList	Custom Objects 15
Custom Object 3	CustomObject4.ChildList	Custom Objects 04
Custom Object 3	CustomObject5.ChildList	Custom Objects 05
Custom Object 3	CustomObject6.ChildList	Custom Objects 06
Custom Object 3	CustomObject7.ChildList	Custom Objects 07
Custom Object 3	CustomObject8.ChildList	Custom Objects 08
Custom Object 3	CustomObject9.ChildList	Custom Objects 09
Custom Object 3	DealRegistration.ChildList	Deal Registrations
Custom Object 3	Exam.ChildList	Exams
Custom Object 3	FinancialAccount.ChildList	Financial Accounts
Custom Object 3	MDFRequest.ChildList	MDF Requests
Custom Object 3	Policy.ChildList	Policies
Custom Object 3	SPRequest.ChildList	Special Pricing Requests

Object System Name	Child Applet Id	Child Applet Name
Custom Object 3	SRChildList	Service Requests
Custom Object 3	TaskOpenChildList	Open Tasks
Custom Object 3	VehicleChildList	Vehicles
CustomObject10	Account.ChildList	Accounts
CustomObject10	Accreditation.ChildList	Accreditations
CustomObject10	Activity.ChildList	Activities
CustomObject10	ActivityClosedChildList	Completed Activities
CustomObject10	AppointmentOpenChildList	Open Appointments
CustomObject10	Asset.ChildList	Assets
CustomObject10	Audit Trail.ChildList	Audit Trail
CustomObject10	Campaign.ChildList	Campaigns
CustomObject10	Certification.ChildList	Certifications
CustomObject10	Channel Partner.ChildList	Dealers
CustomObject10	Contact.ChildList	Contacts
CustomObject10	Course.ChildList	Courses
CustomObject10	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject10	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject10	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject10	Custom Object 1.ChildList	Custom Objects 01
CustomObject10	Custom Object 2.ChildList	Custom Objects 02
CustomObject10	Custom Object 3.ChildList	Custom Objects 03

Object System Name	Child Applet Id	Child Applet Name
CustomObject10	CustomObject10.Book.ChildList	Books
CustomObject10	CustomObject10.SelfChildList	Custom Objects 10
CustomObject10	CustomObject10Team.ChildList	Custom Object 10 Teams
CustomObject10	CustomObject11.ChildList	Custom Objects 11
CustomObject10	CustomObject12.ChildList	Custom Objects 12
CustomObject10	CustomObject13.ChildList	Custom Objects 13
CustomObject10	CustomObject14.ChildList	Custom Objects 14
CustomObject10	CustomObject15.ChildList	Custom Objects 15
CustomObject10	CustomObject4.ChildList	Custom Objects 04
CustomObject10	CustomObject5.ChildList	Custom Objects 05
CustomObject10	CustomObject6.ChildList	Custom Objects 06
CustomObject10	CustomObject7.ChildList	Custom Objects 07
CustomObject10	CustomObject8.ChildList	Custom Objects 08
CustomObject10	CustomObject9.ChildList	Custom Objects 09
CustomObject10	DealRegistration.ChildList	Deal Registrations
CustomObject10	Exam.ChildList	Exams
CustomObject10	FinancialAccount.ChildList	Financial Accounts
CustomObject10	FundRequest.ChildList	Fund Requests
CustomObject10	Fund.ChildList	Funds
CustomObject10	Household.ChildList	Households
CustomObject10	Lead.ChildList	Leads



Object System Name	Child Applet Id	Child Applet Name
CustomObject10	MDFRequest.ChildList	MDF Requests
CustomObject10	MedEdEvent.ChildList	Events
CustomObject10	Opportunity.ChildList	Opportunities
CustomObject10	Partner.ChildList	Partners
CustomObject10	Policy.ChildList	Policies
CustomObject10	Portfolio.ChildList	Portfolios
CustomObject10	Product.ChildList	Products
CustomObject10	Program.ChildList	Partner Programs
CustomObject10	Revenue.ChildList	Revenues
CustomObject10	Service Request.ChildList	Service Requests
CustomObject10	Solution.ChildList	Solutions
CustomObject10	SPRequest.ChildList	Special Pricing Requests
CustomObject10	TaskOpenChildList	Open Tasks
CustomObject10	Vehicle.ChildList	Vehicles
CustomObject11	Account.ChildList	Accounts
CustomObject11	Accreditation.ChildList	Accreditations
CustomObject11	Activity.ChildList	Activities
CustomObject11	ActivityClosedChildList	Completed Activities
CustomObject11	AppointmentOpenChildList	Open Appointments
CustomObject11	Asset.ChildList	Assets
CustomObject11	Audit Trail.ChildList	Audit Trail

Object System Name	Child Applet Id	Child Applet Name
CustomObject11	Campaign.ChildList	Campaigns
CustomObject11	Certification.ChildList	Certifications
CustomObject11	Channel Partner.ChildList	Dealers
CustomObject11	Contact.ChildList	Contacts
CustomObject11	Course.ChildList	Courses
CustomObject11	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject11	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject11	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject11	Custom Object 1.ChildList	Custom Objects 01
CustomObject11	Custom Object 2.ChildList	Custom Objects 02
CustomObject11	Custom Object 3.ChildList	Custom Objects 03
CustomObject11	CustomObject10.ChildList	Custom Objects 10
CustomObject11	CustomObject11 Book.ChildList	Books
CustomObject11	CustomObject11.SelfChildList	Custom Objects 11
CustomObject11	CustomObject11Team.ChildList	Custom Object 11 Teams
CustomObject11	CustomObject12.ChildList	Custom Objects 12
CustomObject11	CustomObject13.ChildList	Custom Objects 13
CustomObject11	CustomObject14.ChildList	Custom Objects 14
CustomObject11	CustomObject15.ChildList	Custom Objects 15
CustomObject11	CustomObject4.ChildList	Custom Objects 04
CustomObject11	CustomObject5.ChildList	Custom Objects 05

Object System Name	Child Applet Id	Child Applet Name
CustomObject11	CustomObject6.ChildList	Custom Objects 06
CustomObject11	CustomObject7.ChildList	Custom Objects 07
CustomObject11	CustomObject8.ChildList	Custom Objects 08
CustomObject11	CustomObject9.ChildList	Custom Objects 09
CustomObject11	DealRegistration.ChildList	Deal Registrations
CustomObject11	Exam.ChildList	Exams
CustomObject11	FinancialAccount.ChildList	Financial Accounts
CustomObject11	Fund Request.ChildList	Fund Requests
CustomObject11	Fund.ChildList	Funds
CustomObject11	Household.ChildList	Households
CustomObject11	Lead.ChildList	Leads
CustomObject11	MDFRequest.ChildList	MDF Requests
CustomObject11	MedEdEvent.ChildList	Events
CustomObject11	Opportunity.ChildList	Opportunities
CustomObject11	Partner.ChildList	Partners
CustomObject11	Policy.ChildList	Policies
CustomObject11	Portfolio.ChildList	Portfolios
CustomObject11	Product.ChildList	Products
CustomObject11	Program.ChildList	Partner Programs
CustomObject11	Revenue.ChildList	Revenues
CustomObject11	Service Request.ChildList	Service Requests

Object System Name	Child Applet Id	Child Applet Name
CustomObject11	Solution.ChildList	Solutions
CustomObject11	SPRequest.ChildList	Special Pricing Requests
CustomObject11	TaskOpenChildList	Open Tasks
CustomObject11	Vehicle.ChildList	Vehicles
CustomObject12	Account.ChildList	Accounts
CustomObject12	Accreditation.ChildList	Accreditations
CustomObject12	Activity.ChildList	Activities
CustomObject12	ActivityClosedChildList	Completed Activities
CustomObject12	AppointmentOpenChildList	Open Appointments
CustomObject12	Asset.ChildList	Assets
CustomObject12	Audit Trail.ChildList	Audit Trail
CustomObject12	Campaign.ChildList	Campaigns
CustomObject12	Certification.ChildList	Certifications
CustomObject12	Channel Partner.ChildList	Dealers
CustomObject12	Contact.ChildList	Contacts
CustomObject12	Course.ChildList	Courses
CustomObject12	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject12	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject12	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject12	Custom Object 1.ChildList	Custom Objects 01
CustomObject12	Custom Object 2.ChildList	Custom Objects 02

Object System Name	Child Applet Id	Child Applet Name
CustomObject12	Custom Object 3.ChildList	Custom Objects 03
CustomObject12	CustomObject10.ChildList	Custom Objects 10
CustomObject12	CustomObject11.ChildList	Custom Objects 11
CustomObject12	CustomObject12 Book.ChildList	Books
CustomObject12	CustomObject12.SelfChildList	Custom Objects 12
CustomObject12	CustomObject12Team.ChildList	Custom Object 12 Teams
CustomObject12	CustomObject13.ChildList	Custom Objects 13
CustomObject12	CustomObject14.ChildList	Custom Objects 14
CustomObject12	CustomObject15.ChildList	Custom Objects 15
CustomObject12	CustomObject4.ChildList	Custom Objects 04
CustomObject12	CustomObject5.ChildList	Custom Objects 05
CustomObject12	CustomObject6.ChildList	Custom Objects 06
CustomObject12	CustomObject7.ChildList	Custom Objects 07
CustomObject12	CustomObject8.ChildList	Custom Objects 08
CustomObject12	CustomObject9.ChildList	Custom Objects 09
CustomObject12	DealRegistration.ChildList	Deal Registrations
CustomObject12	Exam.ChildList	Exams
CustomObject12	FinancialAccount.ChildList	Financial Accounts
CustomObject12	Fund Request.ChildList	Fund Requests
CustomObject12	Fund.ChildList	Funds
CustomObject12	Household.ChildList	Households

Object System Name	Child Applet Id	Child Applet Name
CustomObject12	Lead.ChildList	Leads
CustomObject12	MDFRequest.ChildList	MDF Requests
CustomObject12	MedEdEvent.ChildList	Events
CustomObject12	Opportunity.ChildList	Opportunities
CustomObject12	Partner.ChildList	Partners
CustomObject12	Policy.ChildList	Policies
CustomObject12	Portfolio.ChildList	Portfolios
CustomObject12	Product.ChildList	Products
CustomObject12	Program.ChildList	Partner Programs
CustomObject12	Revenue.ChildList	Revenues
CustomObject12	Service Request.ChildList	Service Requests
CustomObject12	Solution.ChildList	Solutions
CustomObject12	SPRequest.ChildList	Special Pricing Requests
CustomObject12	TaskOpenChildList	Open Tasks
CustomObject12	Vehicle.ChildList	Vehicles
CustomObject13	Account.ChildList	Accounts
CustomObject13	Accreditation.ChildList	Accreditations
CustomObject13	Activity.ChildList	Activities
CustomObject13	ActivityClosedChildList	Completed Activities
CustomObject13	AppointmentOpenChildList	Open Appointments
CustomObject13	Asset.ChildList	Assets

Object System Name	Child Applet Id	Child Applet Name
CustomObject13	Audit Trail.ChildList	Audit Trail
CustomObject13	Campaign.ChildList	Campaigns
CustomObject13	Certification.ChildList	Certifications
CustomObject13	Channel Partner.ChildList	Dealers
CustomObject13	Contact.ChildList	Contacts
CustomObject13	Course.ChildList	Courses
CustomObject13	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject13	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject13	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject13	Custom Object 1.ChildList	Custom Objects 01
CustomObject13	Custom Object 2.ChildList	Custom Objects 02
CustomObject13	Custom Object 3.ChildList	Custom Objects 03
CustomObject13	CustomObject10.ChildList	Custom Objects 10
CustomObject13	CustomObject11.ChildList	Custom Objects 11
CustomObject13	CustomObject12.ChildList	Custom Objects 12
CustomObject13	CustomObject13 Book.ChildList	Books
CustomObject13	CustomObject13.SelfChildList	Custom Objects 13
CustomObject13	CustomObject13Team.ChildList	Custom Object 13 Teams
CustomObject13	CustomObject14.ChildList	Custom Objects 14
CustomObject13	CustomObject15.ChildList	Custom Objects 15
CustomObject13	CustomObject4.ChildList	Custom Objects 04

Object System Name	Child Applet Id	Child Applet Name
CustomObject13	CustomObject5.ChildList	Custom Objects 05
CustomObject13	CustomObject6.ChildList	Custom Objects 06
CustomObject13	CustomObject7.ChildList	Custom Objects 07
CustomObject13	CustomObject8.ChildList	Custom Objects 08
CustomObject13	CustomObject9.ChildList	Custom Objects 09
CustomObject13	DealRegistration.ChildList	Deal Registrations
CustomObject13	Exam.ChildList	Exams
CustomObject13	FinancialAccount.ChildList	Financial Accounts
CustomObject13	Fund Request.ChildList	Fund Requests
CustomObject13	Fund.ChildList	Funds
CustomObject13	Household.ChildList	Households
CustomObject13	Lead.ChildList	Leads
CustomObject13	MDFRequest.ChildList	MDF Requests
CustomObject13	MedEdEvent.ChildList	Events
CustomObject13	Opportunity.ChildList	Opportunities
CustomObject13	Partner.ChildList	Partners
CustomObject13	Policy.ChildList	Policies
CustomObject13	Portfolio.ChildList	Portfolios
CustomObject13	Product.ChildList	Products
CustomObject13	Program.ChildList	Partner Programs
CustomObject13	Revenue.ChildList	Revenues



Object System Name	Child Applet Id	Child Applet Name
CustomObject13	Service Request.ChildList	Service Requests
CustomObject13	Solution.ChildList	Solutions
CustomObject13	SPRequest.ChildList	Special Pricing Requests
CustomObject13	TaskOpenChildList	Open Tasks
CustomObject13	Vehicle.ChildList	Vehicles
CustomObject14	Account.ChildList	Accounts
CustomObject14	Accreditation.ChildList	Accreditations
CustomObject14	Activity.ChildList	Activities
CustomObject14	ActivityClosedChildList	Completed Activities
CustomObject14	AppointmentOpenChildList	Open Appointments
CustomObject14	Asset.ChildList	Assets
CustomObject14	Audit Trail.ChildList	Audit Trail
CustomObject14	Campaign.ChildList	Campaigns
CustomObject14	Certification.ChildList	Certifications
CustomObject14	Channel Partner.ChildList	Dealers
CustomObject14	Contact.ChildList	Contacts
CustomObject14	Course.ChildList	Courses
CustomObject14	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject14	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject14	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject14	Custom Object 1.ChildList	Custom Objects 01

Object System Name	Child Applet Id	Child Applet Name
CustomObject14	Custom Object 2.ChildList	Custom Objects 02
CustomObject14	Custom Object 3.ChildList	Custom Objects 03
CustomObject14	CustomObject10.ChildList	Custom Objects 10
CustomObject14	CustomObject11.ChildList	Custom Objects 11
CustomObject14	CustomObject12.ChildList	Custom Objects 12
CustomObject14	CustomObject13.ChildList	Custom Objects 13
CustomObject14	CustomObject14 Book.ChildList	Books
CustomObject14	CustomObject14.SelfChildList	Custom Objects 14
CustomObject14	CustomObject14Team.ChildList	Custom Object 14 Teams
CustomObject14	CustomObject15.ChildList	Custom Objects 15
CustomObject14	CustomObject4.ChildList	Custom Objects 04
CustomObject14	CustomObject5.ChildList	Custom Objects 05
CustomObject14	CustomObject6.ChildList	Custom Objects 06
CustomObject14	CustomObject7.ChildList	Custom Objects 07
CustomObject14	CustomObject8.ChildList	Custom Objects 08
CustomObject14	CustomObject9.ChildList	Custom Objects 09
CustomObject14	DealRegistration.ChildList	Deal Registrations
CustomObject14	Exam.ChildList	Exams
CustomObject14	FinancialAccount.ChildList	Financial Accounts
CustomObject14	Fund Request.ChildList	Fund Requests
CustomObject14	Fund.ChildList	Funds

Object System Name	Child Applet Id	Child Applet Name
CustomObject14	Household.ChildList	Households
CustomObject14	Lead.ChildList	Leads
CustomObject14	MDFRequest.ChildList	MDF Requests
CustomObject14	MedEdEvent.ChildList	Events
CustomObject14	Opportunity.ChildList	Opportunities
CustomObject14	Partner.ChildList	Partners
CustomObject14	Policy.ChildList	Policies
CustomObject14	Portfolio.ChildList	Portfolios
CustomObject14	Product.ChildList	Products
CustomObject14	Program.ChildList	Partner Programs
CustomObject14	Revenue.ChildList	Revenues
CustomObject14	Service Request.ChildList	Service Requests
CustomObject14	Solution.ChildList	Solutions
CustomObject14	SPRequest.ChildList	Special Pricing Requests
CustomObject14	TaskOpenChildList	Open Tasks
CustomObject14	Vehicle.ChildList	Vehicles
CustomObject15	Account.ChildList	Accounts
CustomObject15	Accreditation.ChildList	Accreditations
CustomObject15	Activity.ChildList	Activities
CustomObject15	ActivityClosedChildList	Completed Activities
CustomObject15	AppointmentOpenChildList	Open Appointments

Object System Name	Child Applet Id	Child Applet Name
CustomObject15	Asset.ChildList	Assets
CustomObject15	Audit Trail.ChildList	Audit Trail
CustomObject15	Campaign.ChildList	Campaigns
CustomObject15	Certification.ChildList	Certifications
CustomObject15	Channel Partner.ChildList	Dealers
CustomObject15	Contact.ChildList	Contacts
CustomObject15	Course.ChildList	Courses
CustomObject15	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject15	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject15	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject15	Custom Object 1.ChildList	Custom Objects 01
CustomObject15	Custom Object 2.ChildList	Custom Objects 02
CustomObject15	Custom Object 3.ChildList	Custom Objects 03
CustomObject15	CustomObject10.ChildList	Custom Objects 10
CustomObject15	CustomObject11.ChildList	Custom Objects 11
CustomObject15	CustomObject12.ChildList	Custom Objects 12
CustomObject15	CustomObject13.ChildList	Custom Objects 13
CustomObject15	CustomObject14.ChildList	Custom Objects 14
CustomObject15	CustomObject15 Book.ChildList	Books
CustomObject15	CustomObject15.SelfChildList	Custom Objects 15
CustomObject15	CustomObject15Team.ChildList	Custom Object 15 Teams

Object System Name	Child Applet Id	Child Applet Name
CustomObject15	CustomObject4.ChildList	Custom Objects 04
CustomObject15	CustomObject5.ChildList	Custom Objects 05
CustomObject15	CustomObject6.ChildList	Custom Objects 06
CustomObject15	CustomObject7.ChildList	Custom Objects 07
CustomObject15	CustomObject8.ChildList	Custom Objects 08
CustomObject15	CustomObject9.ChildList	Custom Objects 09
CustomObject15	DealRegistration.ChildList	Deal Registrations
CustomObject15	Exam.ChildList	Exams
CustomObject15	FinancialAccount.ChildList	Financial Accounts
CustomObject15	Fund Request.ChildList	Fund Requests
CustomObject15	Fund.ChildList	Funds
CustomObject15	Household.ChildList	Households
CustomObject15	Lead.ChildList	Leads
CustomObject15	MDFRequest.ChildList	MDF Requests
CustomObject15	MedEdEvent.ChildList	Events
CustomObject15	Opportunity.ChildList	Opportunities
CustomObject15	Partner.ChildList	Partners
CustomObject15	Policy.ChildList	Policies
CustomObject15	Portfolio.ChildList	Portfolios
CustomObject15	Product.ChildList	Products
CustomObject15	Program.ChildList	Partner Programs

Object System Name	Child Applet Id	Child Applet Name
CustomObject15	Revenue.ChildList	Revenues
CustomObject15	Service Request.ChildList	Service Requests
CustomObject15	Solution.ChildList	Solutions
CustomObject15	SPRequest.ChildList	Special Pricing Requests
CustomObject15	TaskOpenChildList	Open Tasks
CustomObject15	Vehicle.ChildList	Vehicles
CustomObject4	Account.ChildList	Accounts
CustomObject4	Accreditation.ChildList	Accreditations
CustomObject4	Activity.ChildList	Activities
CustomObject4	ActivityClosedChildList	Completed Activities
CustomObject4	AppointmentOpenChildList	Open Appointments
CustomObject4	Asset.ChildList	Assets
CustomObject4	Audit Trail.ChildList	Audit Trail
CustomObject4	Campaign.ChildList	Campaigns
CustomObject4	Certification.ChildList	Certifications
CustomObject4	Channel Partner.ChildList	Dealers
CustomObject4	Contact.ChildList	Contacts
CustomObject4	Course.ChildList	Courses
CustomObject4	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject4	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject4	CRMODLS_SampleLot.ChildList	Sample Lots

Object System Name	Child Applet Id	Child Applet Name
CustomObject4	Custom Object 1.ChildList	Custom Objects 01
CustomObject4	Custom Object 2.ChildList	Custom Objects 02
CustomObject4	Custom Object 3.ChildList	Custom Objects 03
CustomObject4	CustomObject10.ChildList	Custom Objects 10
CustomObject4	CustomObject11.ChildList	Custom Objects 11
CustomObject4	CustomObject12.ChildList	Custom Objects 12
CustomObject4	CustomObject13.ChildList	Custom Objects 13
CustomObject4	CustomObject14.ChildList	Custom Objects 14
CustomObject4	CustomObject15.ChildList	Custom Objects 15
CustomObject4	CustomObject4 Book.ChildList	Books
CustomObject4	CustomObject4.SelfChildList	Custom Objects 04
CustomObject4	CustomObject4Team.ChildList	Custom Object 04 Teams
CustomObject4	CustomObject5.ChildList	Custom Objects 05
CustomObject4	CustomObject6.ChildList	Custom Objects 06
CustomObject4	CustomObject7.ChildList	Custom Objects 07
CustomObject4	CustomObject8.ChildList	Custom Objects 08
CustomObject4	CustomObject9.ChildList	Custom Objects 09
CustomObject4	DealRegistration.ChildList	Deal Registrations
CustomObject4	Exam.ChildList	Exams
CustomObject4	FinancialAccount.ChildList	Financial Accounts
CustomObject4	Fund Request.ChildList	Fund Requests

Object System Name	Child Applet Id	Child Applet Name
CustomObject4	Fund.ChildList	Funds
CustomObject4	Household.ChildList	Households
CustomObject4	Lead.ChildList	Leads
CustomObject4	MDFRequest.ChildList	MDF Requests
CustomObject4	MedEdEvent.ChildList	Events
CustomObject4	Opportunity.ChildList	Opportunities
CustomObject4	Partner.ChildList	Partners
CustomObject4	Policy.ChildList	Policies
CustomObject4	Portfolio.ChildList	Portfolios
CustomObject4	Product.ChildList	Products
CustomObject4	Program.ChildList	Partner Programs
CustomObject4	Revenue.ChildList	Revenues
CustomObject4	Service Request.ChildList	Service Requests
CustomObject4	Solution.ChildList	Solutions
CustomObject4	SPRequest.ChildList	Special Pricing Requests
CustomObject4	TaskOpenChildList	Open Tasks
CustomObject4	Vehicle.ChildList	Vehicles
CustomObject5	Account.ChildList	Accounts
CustomObject5	Accreditation.ChildList	Accreditations
CustomObject5	Activity.ChildList	Activities
CustomObject5	ActivityClosedChildList	Completed Activities



Object System Name	Child Applet Id	Child Applet Name
CustomObject5	AppointmentOpenChildList	Open Appointments
CustomObject5	Asset.ChildList	Assets
CustomObject5	Audit Trail.ChildList	Audit Trail
CustomObject5	Campaign.ChildList	Campaigns
CustomObject5	Certification.ChildList	Certifications
CustomObject5	Channel Partner.ChildList	Dealers
CustomObject5	Contact.ChildList	Contacts
CustomObject5	Course.ChildList	Courses
CustomObject5	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject5	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject5	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject5	Custom Object 1.ChildList	Custom Objects 01
CustomObject5	Custom Object 2.ChildList	Custom Objects 02
CustomObject5	Custom Object 3.ChildList	Custom Objects 03
CustomObject5	CustomObject10.ChildList	Custom Objects 10
CustomObject5	CustomObject11.ChildList	Custom Objects 11
CustomObject5	CustomObject12.ChildList	Custom Objects 12
CustomObject5	CustomObject13.ChildList	Custom Objects 13
CustomObject5	CustomObject14.ChildList	Custom Objects 14
CustomObject5	CustomObject15.ChildList	Custom Objects 15
CustomObject5	CustomObject4.ChildList	Custom Objects 04

Object System Name	Child Applet Id	Child Applet Name
CustomObject5	CustomObject5.Book.ChildList	Books
CustomObject5	CustomObject5.SelfChildList	Custom Objects 05
CustomObject5	CustomObject5.Team.ChildList	Custom Object 05 Teams
CustomObject5	CustomObject6.ChildList	Custom Objects 06
CustomObject5	CustomObject7.ChildList	Custom Objects 07
CustomObject5	CustomObject8.ChildList	Custom Objects 08
CustomObject5	CustomObject9.ChildList	Custom Objects 09
CustomObject5	DealRegistration.ChildList	Deal Registrations
CustomObject5	Exam.ChildList	Exams
CustomObject5	FinancialAccount.ChildList	Financial Accounts
CustomObject5	FundRequest.ChildList	Fund Requests
CustomObject5	Fund.ChildList	Funds
CustomObject5	Household.ChildList	Households
CustomObject5	Lead.ChildList	Leads
CustomObject5	MDFRequest.ChildList	MDF Requests
CustomObject5	MedEdEvent.ChildList	Events
CustomObject5	Opportunity.ChildList	Opportunities
CustomObject5	Partner.ChildList	Partners
CustomObject5	Policy.ChildList	Policies
CustomObject5	Portfolio.ChildList	Portfolios
CustomObject5	Product.ChildList	Products

Object System Name	Child Applet Id	Child Applet Name
CustomObject5	Program.ChildList	Partner Programs
CustomObject5	Revenue.ChildList	Revenues
CustomObject5	Service Request.ChildList	Service Requests
CustomObject5	Solution.ChildList	Solutions
CustomObject5	SPRequest.ChildList	Special Pricing Requests
CustomObject5	TaskOpenChildList	Open Tasks
CustomObject5	Vehicle.ChildList	Vehicles
CustomObject6	Account.ChildList	Accounts
CustomObject6	Accreditation.ChildList	Accreditations
CustomObject6	Activity.ChildList	Activities
CustomObject6	ActivityClosedChildList	Completed Activities
CustomObject6	AppointmentOpenChildList	Open Appointments
CustomObject6	Asset.ChildList	Assets
CustomObject6	Audit Trail.ChildList	Audit Trail
CustomObject6	Campaign.ChildList	Campaigns
CustomObject6	Certification.ChildList	Certifications
CustomObject6	Channel Partner.ChildList	Dealers
CustomObject6	Contact.ChildList	Contacts
CustomObject6	Course.ChildList	Courses
CustomObject6	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject6	CRMODLS_InventoryPeriod.ChildList	Inventory Periods

Object System Name	Child Applet Id	Child Applet Name
CustomObject6	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject6	Custom Object 1.ChildList	Custom Objects 01
CustomObject6	Custom Object 2.ChildList	Custom Objects 02
CustomObject6	Custom Object 3.ChildList	Custom Objects 03
CustomObject6	CustomObject10.ChildList	Custom Objects 10
CustomObject6	CustomObject11.ChildList	Custom Objects 11
CustomObject6	CustomObject12.ChildList	Custom Objects 12
CustomObject6	CustomObject13.ChildList	Custom Objects 13
CustomObject6	CustomObject14.ChildList	Custom Objects 14
CustomObject6	CustomObject15.ChildList	Custom Objects 15
CustomObject6	CustomObject4.ChildList	Custom Objects 04
CustomObject6	CustomObject5.ChildList	Custom Objects 05
CustomObject6	CustomObject6 Book.ChildList	Books
CustomObject6	CustomObject6.SelfChildList	Custom Objects 06
CustomObject6	CustomObject6Team.ChildList	Custom Object 06 Teams
CustomObject6	CustomObject7.ChildList	Custom Objects 07
CustomObject6	CustomObject8.ChildList	Custom Objects 08
CustomObject6	CustomObject9.ChildList	Custom Objects 09
CustomObject6	DealRegistration.ChildList	Deal Registrations
CustomObject6	Exam.ChildList	Exams
CustomObject6	FinancialAccount.ChildList	Financial Accounts

Object System Name	Child Applet Id	Child Applet Name
CustomObject6	Fund Request.ChildList	Fund Requests
CustomObject6	Fund.ChildList	Funds
CustomObject6	Household.ChildList	Households
CustomObject6	Lead.ChildList	Leads
CustomObject6	MDFRequest.ChildList	MDF Requests
CustomObject6	MedEdEvent.ChildList	Events
CustomObject6	Opportunity.ChildList	Opportunities
CustomObject6	Partner.ChildList	Partners
CustomObject6	Policy.ChildList	Policies
CustomObject6	Portfolio.ChildList	Portfolios
CustomObject6	Product.ChildList	Products
CustomObject6	Program.ChildList	Partner Programs
CustomObject6	Revenue.ChildList	Revenues
CustomObject6	Service Request.ChildList	Service Requests
CustomObject6	Solution.ChildList	Solutions
CustomObject6	SPRequest.ChildList	Special Pricing Requests
CustomObject6	TaskOpenChildList	Open Tasks
CustomObject6	Vehicle.ChildList	Vehicles
CustomObject7	Account.ChildList	Accounts
CustomObject7	Accreditation.ChildList	Accreditations
CustomObject7	Activity.ChildList	Activities

Object System Name	Child Applet Id	Child Applet Name
CustomObject7	ActivityClosedChildList	Completed Activities
CustomObject7	AppointmentOpenChildList	Open Appointments
CustomObject7	Asset.ChildList	Assets
CustomObject7	Audit Trail.ChildList	Audit Trail
CustomObject7	Campaign.ChildList	Campaigns
CustomObject7	Certification.ChildList	Certifications
CustomObject7	Channel Partner.ChildList	Dealers
CustomObject7	Contact.ChildList	Contacts
CustomObject7	Course.ChildList	Courses
CustomObject7	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject7	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject7	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject7	Custom Object 1.ChildList	Custom Objects 01
CustomObject7	Custom Object 2.ChildList	Custom Objects 02
CustomObject7	Custom Object 3.ChildList	Custom Objects 03
CustomObject7	CustomObject10.ChildList	Custom Objects 10
CustomObject7	CustomObject11.ChildList	Custom Objects 11
CustomObject7	CustomObject12.ChildList	Custom Objects 12
CustomObject7	CustomObject13.ChildList	Custom Objects 13
CustomObject7	CustomObject14.ChildList	Custom Objects 14
CustomObject7	CustomObject15.ChildList	Custom Objects 15

Object System Name	Child Applet Id	Child Applet Name
CustomObject7	CustomObject4.ChildList	Custom Objects 04
CustomObject7	CustomObject5.ChildList	Custom Objects 05
CustomObject7	CustomObject6.ChildList	Custom Objects 06
CustomObject7	CustomObject7 Book.ChildList	Books
CustomObject7	CustomObject7.SelfChildList	Custom Objects 07
CustomObject7	CustomObject7Team.ChildList	Custom Object 07 Teams
CustomObject7	CustomObject8.ChildList	Custom Objects 08
CustomObject7	CustomObject9.ChildList	Custom Objects 09
CustomObject7	DealRegistration.ChildList	Deal Registrations
CustomObject7	Exam.ChildList	Exams
CustomObject7	FinancialAccount.ChildList	Financial Accounts
CustomObject7	Fund Request.ChildList	Fund Requests
CustomObject7	Fund.ChildList	Funds
CustomObject7	Household.ChildList	Households
CustomObject7	Lead.ChildList	Leads
CustomObject7	MDFRequest.ChildList	MDF Requests
CustomObject7	MedEdEvent.ChildList	Events
CustomObject7	Opportunity.ChildList	Opportunities
CustomObject7	Partner.ChildList	Partners
CustomObject7	Policy.ChildList	Policies
CustomObject7	Portfolio.ChildList	Portfolios

Object System Name	Child Applet Id	Child Applet Name
CustomObject7	Product.ChildList	Products
CustomObject7	Program.ChildList	Partner Programs
CustomObject7	Revenue.ChildList	Revenues
CustomObject7	Service Request.ChildList	Service Requests
CustomObject7	Solution.ChildList	Solutions
CustomObject7	SPRequest.ChildList	Special Pricing Requests
CustomObject7	TaskOpenChildList	Open Tasks
CustomObject7	Vehicle.ChildList	Vehicles
CustomObject8	Account.ChildList	Accounts
CustomObject8	Accreditation.ChildList	Accreditations
CustomObject8	Activity.ChildList	Activities
CustomObject8	ActivityClosedChildList	Completed Activities
CustomObject8	AppointmentOpenChildList	Open Appointments
CustomObject8	Asset.ChildList	Assets
CustomObject8	Audit Trail.ChildList	Audit Trail
CustomObject8	Campaign.ChildList	Campaigns
CustomObject8	Certification.ChildList	Certifications
CustomObject8	Channel Partner.ChildList	Dealers
CustomObject8	Contact.ChildList	Contacts
CustomObject8	Course.ChildList	Courses
CustomObject8	CRMOD_LS_Transactions.ChildList	Sample Transactions



Object System Name	Child Applet Id	Child Applet Name
CustomObject8	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject8	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject8	Custom Object 1.ChildList	Custom Objects 01
CustomObject8	Custom Object 2.ChildList	Custom Objects 02
CustomObject8	Custom Object 3.ChildList	Custom Objects 03
CustomObject8	CustomObject10.ChildList	Custom Objects 10
CustomObject8	CustomObject11.ChildList	Custom Objects 11
CustomObject8	CustomObject12.ChildList	Custom Objects 12
CustomObject8	CustomObject13.ChildList	Custom Objects 13
CustomObject8	CustomObject14.ChildList	Custom Objects 14
CustomObject8	CustomObject15.ChildList	Custom Objects 15
CustomObject8	CustomObject4.ChildList	Custom Objects 04
CustomObject8	CustomObject5.ChildList	Custom Objects 05
CustomObject8	CustomObject6.ChildList	Custom Objects 06
CustomObject8	CustomObject7.ChildList	Custom Objects 07
CustomObject8	CustomObject8 Book.ChildList	Books
CustomObject8	CustomObject8.SelfChildList	Custom Objects 08
CustomObject8	CustomObject8Team.ChildList	Custom Object 08 Teams
CustomObject8	CustomObject9.ChildList	Custom Objects 09
CustomObject8	DealRegistration.ChildList	Deal Registrations
CustomObject8	Exam.ChildList	Exams

Object System Name	Child Applet Id	Child Applet Name
CustomObject8	FinancialAccount.ChildList	Financial Accounts
CustomObject8	Fund Request.ChildList	Fund Requests
CustomObject8	Fund.ChildList	Funds
CustomObject8	Household.ChildList	Households
CustomObject8	Lead.ChildList	Leads
CustomObject8	MDFRequest.ChildList	MDF Requests
CustomObject8	MedEdEvent.ChildList	Events
CustomObject8	Opportunity.ChildList	Opportunities
CustomObject8	Partner.ChildList	Partners
CustomObject8	Policy.ChildList	Policies
CustomObject8	Portfolio.ChildList	Portfolios
CustomObject8	Product.ChildList	Products
CustomObject8	Program.ChildList	Partner Programs
CustomObject8	Revenue.ChildList	Revenues
CustomObject8	Service Request.ChildList	Service Requests
CustomObject8	Solution.ChildList	Solutions
CustomObject8	SPRequest.ChildList	Special Pricing Requests
CustomObject8	TaskOpenChildList	Open Tasks
CustomObject8	Vehicle.ChildList	Vehicles
CustomObject9	Account.ChildList	Accounts
CustomObject9	Accreditation.ChildList	Accreditations

Object System Name	Child Applet Id	Child Applet Name
CustomObject9	Activity.ChildList	Activities
CustomObject9	ActivityClosedChildList	Completed Activities
CustomObject9	AppointmentOpenChildList	Open Appointments
CustomObject9	Asset.ChildList	Assets
CustomObject9	Audit Trail.ChildList	Audit Trail
CustomObject9	Campaign.ChildList	Campaigns
CustomObject9	Certification.ChildList	Certifications
CustomObject9	Channel Partner.ChildList	Dealers
CustomObject9	Contact.ChildList	Contacts
CustomObject9	Course.ChildList	Courses
CustomObject9	CRMOD_LS_Transactions.ChildList	Sample Transactions
CustomObject9	CRMODLS_InventoryPeriod.ChildList	Inventory Periods
CustomObject9	CRMODLS_SampleLot.ChildList	Sample Lots
CustomObject9	Custom Object 1.ChildList	Custom Objects 01
CustomObject9	Custom Object 2.ChildList	Custom Objects 02
CustomObject9	Custom Object 3.ChildList	Custom Objects 03
CustomObject9	CustomObject10.ChildList	Custom Objects 10
CustomObject9	CustomObject11.ChildList	Custom Objects 11
CustomObject9	CustomObject12.ChildList	Custom Objects 12
CustomObject9	CustomObject13.ChildList	Custom Objects 13
CustomObject9	CustomObject14.ChildList	Custom Objects 14

Object System Name	Child Applet Id	Child Applet Name
CustomObject9	CustomObject15.ChildList	Custom Objects 15
CustomObject9	CustomObject4.ChildList	Custom Objects 04
CustomObject9	CustomObject5.ChildList	Custom Objects 05
CustomObject9	CustomObject6.ChildList	Custom Objects 06
CustomObject9	CustomObject7.ChildList	Custom Objects 07
CustomObject9	CustomObject8.ChildList	Custom Objects 08
CustomObject9	CustomObject9 Book.ChildList	Books
CustomObject9	CustomObject9.SelfChildList	Custom Objects 09
CustomObject9	CustomObject9Team.ChildList	Custom Object 09 Teams
CustomObject9	DealRegistration.ChildList	Deal Registrations
CustomObject9	Exam.ChildList	Exams
CustomObject9	FinancialAccount.ChildList	Financial Accounts
CustomObject9	Fund Request.ChildList	Fund Requests
CustomObject9	Fund.ChildList	Funds
CustomObject9	Household.ChildList	Households
CustomObject9	Lead.ChildList	Leads
CustomObject9	MDFRequest.ChildList	MDF Requests
CustomObject9	MedEdEvent.ChildList	Events
CustomObject9	Opportunity.ChildList	Opportunities
CustomObject9	Partner.ChildList	Partners
CustomObject9	Policy.ChildList	Policies

Object System Name	Child Applet Id	Child Applet Name
CustomObject9	Portfolio.ChildList	Portfolios
CustomObject9	Product.ChildList	Products
CustomObject9	Program.ChildList	Partner Programs
CustomObject9	Revenue.ChildList	Revenues
CustomObject9	Service Request.ChildList	Service Requests
CustomObject9	Solution.ChildList	Solutions
CustomObject9	SPRequest.ChildList	Special Pricing Requests
CustomObject9	TaskOpenChildList	Open Tasks
CustomObject9	Vehicle.ChildList	Vehicles
Damage	Audit Trail.ChildList	Audit Trail
DealRegistration	Activity.ChildList	Activities
DealRegistration	ActivityClosedChildList	Completed Activities
DealRegistration	AppointmentOpenChildList	Open Appointments
DealRegistration	Audit Trail.ChildList	Audit Trail
DealRegistration	Custom Object 1.ChildList	Custom Objects 01
DealRegistration	Custom Object 2.ChildList	Custom Objects 02
DealRegistration	Custom Object 3.ChildList	Custom Objects 03
DealRegistration	CustomObject10.ChildList	Custom Objects 10
DealRegistration	CustomObject11.ChildList	Custom Objects 11
DealRegistration	CustomObject12.ChildList	Custom Objects 12
DealRegistration	CustomObject13.ChildList	Custom Objects 13

Object System Name	Child Applet Id	Child Applet Name
DealRegistration	CustomObject14.ChildList	Custom Objects 14
DealRegistration	CustomObject15.ChildList	Custom Objects 15
DealRegistration	CustomObject4.ChildList	Custom Objects 04
DealRegistration	CustomObject5.ChildList	Custom Objects 05
DealRegistration	CustomObject6.ChildList	Custom Objects 06
DealRegistration	CustomObject7.ChildList	Custom Objects 07
DealRegistration	CustomObject8.ChildList	Custom Objects 08
DealRegistration	CustomObject9.ChildList	Custom Objects 09
DealRegistration	DealRegistration Book.ChildList	Books
DealRegistration	DealRegistrationRevenue.ChildList	Deal Registration Product Revenues
DealRegistration	DealRegistrationTeam.ChildList	Deal Registration Teams
DealRegistration	Lead.ChildList	Leads
DealRegistration	SPRequest.ChildList	Special Pricing Requests
DealRegistration	TaskOpenChildList	Open Tasks
Division	Audit Trail.ChildList	Audit Trail
Division	DivisionUser.ChildList	User List
Exam	Audit Trail.ChildList	Audit Trail
Exam	CertificationExam.ChildList	Certification Exams
Exam	Course.ChildList	Courses
Exam	CourseExam.ChildList	Course Exams
Exam	Custom Object 1.ChildList	Custom Objects 01

Object System Name	Child Applet Id	Child Applet Name
Exam	Custom Object 2.ChildList	Custom Objects 02
Exam	Custom Object 3.ChildList	Custom Objects 03
Exam	CustomObject10.ChildList	Custom Objects 10
Exam	CustomObject11.ChildList	Custom Objects 11
Exam	CustomObject12.ChildList	Custom Objects 12
Exam	CustomObject13.ChildList	Custom Objects 13
Exam	CustomObject14.ChildList	Custom Objects 14
Exam	CustomObject15.ChildList	Custom Objects 15
Exam	CustomObject4.ChildList	Custom Objects 04
Exam	CustomObject5.ChildList	Custom Objects 05
Exam	CustomObject6.ChildList	Custom Objects 06
Exam	CustomObject7.ChildList	Custom Objects 07
Exam	CustomObject8.ChildList	Custom Objects 08
Exam	CustomObject9.ChildList	Custom Objects 09
Exam	Exam Book.ChildList	Books
Exam	ExamAttachment.ChildList	Exam Attachments
Exam	ExamCategory.ChildList	Exam Product Product Categories
Exam	ExamPartner.ChildList	Exam Partners
Exam	ExamProduct.ChildList	Exam Products
Exam	ExamRegistration.ChildList	Exam Registrations
Exam	ExamRelationship.ChildList	Related Exams

Object System Name	Child Applet Id	Child Applet Name
Exam	ExamSolution.ChildList	Exam Solutions
Exam	ExamTeam.ChildList	Exam Teams
FinancialAccount	Activity.ChildList	Activities
FinancialAccount	ActivityClosedChildList	Completed Activities
FinancialAccount	AppointmentOpenChildList	Open Appointments
FinancialAccount	Audit Trail.ChildList	Audit Trail
FinancialAccount	Custom Object 1.ChildList	Custom Objects 01
FinancialAccount	Custom Object 2.ChildList	Custom Objects 02
FinancialAccount	Custom Object 3.ChildList	Custom Objects 03
FinancialAccount	CustomObject10.ChildList	Custom Objects 10
FinancialAccount	CustomObject11.ChildList	Custom Objects 11
FinancialAccount	CustomObject12.ChildList	Custom Objects 12
FinancialAccount	CustomObject13.ChildList	Custom Objects 13
FinancialAccount	CustomObject14.ChildList	Custom Objects 14
FinancialAccount	CustomObject15.ChildList	Custom Objects 15
FinancialAccount	CustomObject4.ChildList	Custom Objects 04
FinancialAccount	CustomObject5.ChildList	Custom Objects 05
FinancialAccount	CustomObject6.ChildList	Custom Objects 06
FinancialAccount	CustomObject7.ChildList	Custom Objects 07
FinancialAccount	CustomObject8.ChildList	Custom Objects 08
FinancialAccount	CustomObject9.ChildList	Custom Objects 09



Object System Name	Child Applet Id	Child Applet Name
FinancialAccount	FinancialAccount Book.ChildList	Books
FinancialAccount	FinancialAccount.SelfChildList	Financial Accounts
FinancialAccount	FinancialAccountHolder.ChildList	Financial Account Holders
FinancialAccount	FinancialAccountHolding.ChildList	Financial Account Holdings
FinancialAccount	FinancialPlan.ChildList	Financial Plans
FinancialAccount	FinancialTransaction.ChildList	Financial Transactions
FinancialAccount	Lead.ChildList	Leads
FinancialAccount	Opportunity.ChildList	Opportunities
FinancialAccount	Policy.ChildList	Policies
FinancialAccount	Service Request.ChildList	Service Requests
FinancialAccount	TaskOpenChildList	Open Tasks
FinancialAccountHolder	Audit Trail.ChildList	Audit Trail
FinancialAccountHolding	Audit Trail.ChildList	Audit Trail
FinancialPlan	Activity.ChildList	Activities
FinancialPlan	ActivityClosedChildList	Completed Activities
FinancialPlan	AppointmentOpenChildList	Open Appointments
FinancialPlan	Audit Trail.ChildList	Audit Trail
FinancialPlan	FinancialPlan Book.ChildList	Books
FinancialPlan	Lead.ChildList	Leads
FinancialPlan	Opportunity.ChildList	Opportunities
FinancialPlan	Service Request.ChildList	Service Requests

Object System Name	Child Applet Id	Child Applet Name
FinancialPlan	TaskOpenChildList	Open Tasks
FinancialProduct	Audit Trail.ChildList	Audit Trail
FinancialProduct	Coverage.ChildList	Coverages
FinancialProduct	FinancialAccountHolding.ChildList	Financial Account Holdings
FinancialProduct	FinancialProduct.SelfChildList	Financial Products
FinancialProduct	FinancialTransaction.ChildList	Financial Transactions
FinancialTransaction	Audit Trail.ChildList	Audit Trail
FinancialTransaction	FinancialTransaction.SelfChildList	Financial Transactions
FinancialTransaction	Service Request.ChildList	Service Requests
Fund	Activity.ChildList	Activities
Fund	ActivityClosedChildList	Completed Activities
Fund	AppointmentOpenChildList	Open Appointments
Fund	CRMODLS_OBJECTIVE.ChildList	Objectives
Fund	CustObj1ChildList	Custom Objects 01
Fund	CustObj2ChildList	Custom Objects 02
Fund	CustObj3ChildList	Custom Objects 03
Fund	CustomObject10.ChildList	Custom Objects 10
Fund	CustomObject11.ChildList	Custom Objects 11
Fund	CustomObject12.ChildList	Custom Objects 12
Fund	CustomObject13.ChildList	Custom Objects 13
Fund	CustomObject14.ChildList	Custom Objects 14

Object System Name	Child Applet Id	Child Applet Name
Fund	CustomObject15.ChildList	Custom Objects 15
Fund	CustomObject4.ChildList	Custom Objects 04
Fund	CustomObject5.ChildList	Custom Objects 05
Fund	CustomObject6.ChildList	Custom Objects 06
Fund	CustomObject7.ChildList	Custom Objects 07
Fund	CustomObject8.ChildList	Custom Objects 08
Fund	CustomObject9.ChildList	Custom Objects 09
Fund	FundAuditTrailChildList	Audit Trail
Fund	FundBookChildList	Books
Fund	FundCreditChildList	Fund Credits
Fund	FundDebitChildList	Fund Debits
Fund	FundFACHildList	Attachments
Fund	FundNoteChildList	Notes
Fund	FundParticipantChildList	Fund Participants
Fund	FundPartnerChildList	Fund Memberships
Fund	FundRequestChildList	Fund Requests
Fund	MDFRequest.ChildList	MDF Requests
Fund	MedEdEvent.ChildList	Events
Fund	SPRequest.ChildList	Special Pricing Requests
Fund	TaskOpenChildList	Open Tasks
Fund Request	ActivityClosedChildList	Completed Activities

Object System Name	Child Applet Id	Child Applet Name
Fund Request	ActivityOpenChildList	Open Activities
Fund Request	AppointmentOpenChildList	Open Appointments
Fund Request	CustomObject10.ChildList	Custom Objects 10
Fund Request	CustomObject11.ChildList	Custom Objects 11
Fund Request	CustomObject12.ChildList	Custom Objects 12
Fund Request	CustomObject13.ChildList	Custom Objects 13
Fund Request	CustomObject14.ChildList	Custom Objects 14
Fund Request	CustomObject15.ChildList	Custom Objects 15
Fund Request	CustomObject4.ChildList	Custom Objects 04
Fund Request	CustomObject5.ChildList	Custom Objects 05
Fund Request	CustomObject6.ChildList	Custom Objects 06
Fund Request	CustomObject7.ChildList	Custom Objects 07
Fund Request	CustomObject8.ChildList	Custom Objects 08
Fund Request	CustomObject9.ChildList	Custom Objects 09
Fund Request	FundRequestAuditTrailChildList	Audit Trail
Fund Request	FundRequestFACHildList	Attachments
Fund Request	FundRequestNoteChildList	Notes
Fund Request	TaskOpenChildList	Open Tasks
HCPContactAllocation	Audit Trail.ChildList	Audit Trail
HCPContactAllocation	HCPContactAllocation Book.ChildList	Books
Household	AppointmentOpenChildList	Open Appointments

Object System Name	Child Applet Id	Child Applet Name
Household	Audit Trail.ChildList	Audit Trail
Household	Claim.ChildList	Claims
Household	CustObj1ChildList	Custom Objects 01
Household	CustObj2ChildList	Custom Objects 02
Household	CustObj3ChildList	Custom Objects 03
Household	CustomObject10.ChildList	Custom Objects 10
Household	CustomObject11.ChildList	Custom Objects 11
Household	CustomObject12.ChildList	Custom Objects 12
Household	CustomObject13.ChildList	Custom Objects 13
Household	CustomObject14.ChildList	Custom Objects 14
Household	CustomObject15.ChildList	Custom Objects 15
Household	CustomObject4.ChildList	Custom Objects 04
Household	CustomObject5.ChildList	Custom Objects 05
Household	CustomObject6.ChildList	Custom Objects 06
Household	CustomObject7.ChildList	Custom Objects 07
Household	CustomObject8.ChildList	Custom Objects 08
Household	CustomObject9.ChildList	Custom Objects 09
Household	FinancialAccount.ChildList	Financial Accounts
Household	FinancialAccountHolder.ChildList	Financial Account Holders
Household	FinancialPlan.ChildList	Financial Plans
Household	HouseholdActivityClosedChildList	Completed Activities

Object System Name	Child Applet Id	Child Applet Name
Household	HouseholdActivityOpenChildList	Open Activities
Household	HouseholdBookChildList	Books
Household	HouseholdContactChildList	Contacts
Household	HouseholdFACHildList	Attachments
Household	HouseholdLeadChildList	Leads
Household	HouseholdNoteChildList	Notes
Household	HouseholdOptyChildList	Opportunities
Household	HouseholdPortfolioChildList	Portfolio
Household	HouseholdSRChildList	Service Requests
Household	HouseholdTeamChildList	Household Team
Household	Policy.ChildList	Policies
Household	PolicyHolder.ChildList	Policy Holders
Household	TaskOpenChildList	Open Tasks
InsuranceProperty	Audit Trail.ChildList	Audit Trail
InsuranceProperty	Coverage.ChildList	Coverages
InsuranceProperty	Damage.ChildList	Damages
InvolvedParty	Audit Trail.ChildList	Audit Trail
Lead	ActivityClosedChildList	Completed Activities
Lead	ActivityOpenChildList	Open Activities
Lead	AppointmentOpenChildList	Open Appointments
Lead	Audit Trail.ChildList	Audit Trail

Object System Name	Child Applet Id	Child Applet Name
Lead	CustObj1ChildList	Custom Objects 01
Lead	CustObj2ChildList	Custom Objects 02
Lead	CustObj3ChildList	Custom Objects 03
Lead	CustomObject10.ChildList	Custom Objects 10
Lead	CustomObject11.ChildList	Custom Objects 11
Lead	CustomObject12.ChildList	Custom Objects 12
Lead	CustomObject13.ChildList	Custom Objects 13
Lead	CustomObject14.ChildList	Custom Objects 14
Lead	CustomObject15.ChildList	Custom Objects 15
Lead	CustomObject4.ChildList	Custom Objects 04
Lead	CustomObject5.ChildList	Custom Objects 05
Lead	CustomObject6.ChildList	Custom Objects 06
Lead	CustomObject7.ChildList	Custom Objects 07
Lead	CustomObject8.ChildList	Custom Objects 08
Lead	CustomObject9.ChildList	Custom Objects 09
Lead	DealRegistration.ChildList	Deal Registrations
Lead	LeadBookChildList	Books
Lead	LeadEvent.ChildList	Lead Event
Lead	LeadFACHildList	Attachments
Lead	LeadPartnerChildList	Lead Partners
Lead	LeadQualScriptChildList	Lead Qualification Scripts

Object System Name	Child Applet Id	Child Applet Name
Lead	LeadTeam.ChildList	Lead Teams
Lead	TaskOpenChildList	Open Tasks
LeadEvent	Audit Trail.ChildList	Audit Trail
MDFRequest	Activity.ChildList	Activities
MDFRequest	ActivityClosedChildList	Completed Activities
MDFRequest	AppointmentOpenChildList	Open Appointments
MDFRequest	Audit Trail.ChildList	Audit Trail
MDFRequest	Custom Object 1.ChildList	Custom Objects 01
MDFRequest	Custom Object 2.ChildList	Custom Objects 02
MDFRequest	Custom Object 3.ChildList	Custom Objects 03
MDFRequest	CustomObject10.ChildList	Custom Objects 10
MDFRequest	CustomObject11.ChildList	Custom Objects 11
MDFRequest	CustomObject12.ChildList	Custom Objects 12
MDFRequest	CustomObject13.ChildList	Custom Objects 13
MDFRequest	CustomObject14.ChildList	Custom Objects 14
MDFRequest	CustomObject15.ChildList	Custom Objects 15
MDFRequest	CustomObject4.ChildList	Custom Objects 04
MDFRequest	CustomObject5.ChildList	Custom Objects 05
MDFRequest	CustomObject6.ChildList	Custom Objects 06
MDFRequest	CustomObject7.ChildList	Custom Objects 07
MDFRequest	CustomObject8.ChildList	Custom Objects 08



Object System Name	Child Applet Id	Child Applet Name
MDFRequest	CustomObject9.ChildList	Custom Objects 09
MDFRequest	MDFRequest Book.ChildList	Books
MDFRequest	MDFRequestAttachment.ChildList	MDF Request Attachments
MDFRequest	MDFRequestTeam.ChildList	MDF Request Teams
MDFRequest	TaskOpenChildList	Open Tasks
MedEdEvent	AccountEvent.ChildList	Account Event
MedEdEvent	ActivityClosedChildList	Completed Activities
MedEdEvent	ActivityOpenChildList	Open Activities
MedEdEvent	AppointmentOpenChildList	Open Appointments
MedEdEvent	Audit Trail.ChildList	Audit Trail
MedEdEvent	Campaign.ChildList	Campaigns
MedEdEvent	CRMODLS_BusinessPlan.ChildList	Business Plans
MedEdEvent	CRMODLS_OBJECTIVE.ChildList	Objectives
MedEdEvent	CustObj1ChildList	Custom Objects 01
MedEdEvent	CustObj2ChildList	Custom Objects 02
MedEdEvent	CustObj3ChildList	Custom Objects 03
MedEdEvent	CustomObject10.ChildList	Custom Objects 10
MedEdEvent	CustomObject11.ChildList	Custom Objects 11
MedEdEvent	CustomObject12.ChildList	Custom Objects 12
MedEdEvent	CustomObject13.ChildList	Custom Objects 13
MedEdEvent	CustomObject14.ChildList	Custom Objects 14

Object System Name	Child Applet Id	Child Applet Name
MedEdEvent	CustomObject15.ChildList	Custom Objects 15
MedEdEvent	CustomObject4.ChildList	Custom Objects 04
MedEdEvent	CustomObject5.ChildList	Custom Objects 05
MedEdEvent	CustomObject6.ChildList	Custom Objects 06
MedEdEvent	CustomObject7.ChildList	Custom Objects 07
MedEdEvent	CustomObject8.ChildList	Custom Objects 08
MedEdEvent	CustomObject9.ChildList	Custom Objects 09
MedEdEvent	Fund.ChildList	Funds
MedEdEvent	LeadEvent.ChildList	Lead Event
MedEdEvent	MedEdFACHildList	Attachments
MedEdEvent	MedEdInviteeChildList	Invitees
MedEdEvent	OpportunityEvent.ChildList	Opportunity Event
MedEdEvent	Pharma ME Event Book.ChildList	Books
MedEdEvent	Pharma ME EventTeam.ChildList	Event Teams
MedEdEvent	TaskOpenChildList	Open Tasks
MedEdInvitee	InviteeAuditTrailChildList	Audit Trail
Opportunity	ActivityClosedChildList	Completed Activities
Opportunity	ActivityOpenChildList	Open Activities
Opportunity	AppointmentOpenChildList	Open Appointments
Opportunity	Asset.ChildList	Assets
Opportunity	ContactRoleChildList	Contacts

Object System Name	Child Applet Id	Child Applet Name
Opportunity	CRMODLS_PlanOpportunities.ChildList	Plan Opportunities
Opportunity	CustObj1ChildList	Custom Objects 01
Opportunity	CustObj2ChildList	Custom Objects 02
Opportunity	CustObj3ChildList	Custom Objects 03
Opportunity	CustomObject10.ChildList	Custom Objects 10
Opportunity	CustomObject11.ChildList	Custom Objects 11
Opportunity	CustomObject12.ChildList	Custom Objects 12
Opportunity	CustomObject13.ChildList	Custom Objects 13
Opportunity	CustomObject14.ChildList	Custom Objects 14
Opportunity	CustomObject15.ChildList	Custom Objects 15
Opportunity	CustomObject4.ChildList	Custom Objects 04
Opportunity	CustomObject5.ChildList	Custom Objects 05
Opportunity	CustomObject6.ChildList	Custom Objects 06
Opportunity	CustomObject7.ChildList	Custom Objects 07
Opportunity	CustomObject8.ChildList	Custom Objects 08
Opportunity	CustomObject9.ChildList	Custom Objects 09
Opportunity	DealRegistration.ChildList	Deal Registrations
Opportunity	LeadChildList	Leads
Opportunity	Opportunity.SelfChildList	Sub-Opportunities
Opportunity	OpportunityBookChildList	Books
Opportunity	OpportunityCompetitorChildList	Opportunity Competitors

Object System Name	Child Applet Id	Child Applet Name
Opportunity	OpportunityEvent.ChildList	Opportunity Event
Opportunity	OpportunityFAChildList	Attachments
Opportunity	OpportunityPartnerChildList	Opportunity Partners
Opportunity	OpportunityTeamChildList	Opportunity Team
Opportunity	OpptyAssessmentChildList	Opportunity Assessments
Opportunity	OpptyAuditTrailChildList	Audit Trail
Opportunity	OpptyNoteChildList	Notes
Opportunity	OracleSocialNetwork.ChildList	Social
Opportunity	Order.ChildList	Orders
Opportunity	ProductRevenueChildList	Opportunity Product Revenues
Opportunity	Quote.ChildList	Quotes
Opportunity	SPRequest.ChildList	Special Pricing Requests
Opportunity	SRChildList	Service Requests
Opportunity	TaskOpenChildList	Open Tasks
OpportunityEvent	Audit Trail.ChildList	Audit Trail
Order	Audit Trail.ChildList	Audit Trail
Order	Custom Object 1.ChildList	Custom Objects 01
Order	Custom Object 2.ChildList	Custom Objects 02
Order	Custom Object 3.ChildList	Custom Objects 03
Order	CustomObject10.ChildList	Custom Objects 10
Order	CustomObject11.ChildList	Custom Objects 11

Object System Name	Child Applet Id	Child Applet Name
Order	CustomObject12.ChildList	Custom Objects 12
Order	CustomObject13.ChildList	Custom Objects 13
Order	CustomObject14.ChildList	Custom Objects 14
Order	CustomObject15.ChildList	Custom Objects 15
Order	CustomObject4.ChildList	Custom Objects 04
Order	CustomObject5.ChildList	Custom Objects 05
Order	CustomObject6.ChildList	Custom Objects 06
Order	CustomObject7.ChildList	Custom Objects 07
Order	CustomObject8.ChildList	Custom Objects 08
Order	CustomObject9.ChildList	Custom Objects 09
Order	Order Book.ChildList	Books
Order	OrderItem.ChildList	Order Items
Order	OrderTeam.ChildList	Order Teams
OrderItem	Custom Object 1.ChildList	Custom Objects 01
OrderItem	Custom Object 2.ChildList	Custom Objects 02
OrderItem	Custom Object 3.ChildList	Custom Objects 03
OrderItem	CustomObject10.ChildList	Custom Objects 10
OrderItem	CustomObject11.ChildList	Custom Objects 11
OrderItem	CustomObject12.ChildList	Custom Objects 12
OrderItem	CustomObject13.ChildList	Custom Objects 13
OrderItem	CustomObject14.ChildList	Custom Objects 14

Object System Name	Child Applet Id	Child Applet Name
OrderItem	CustomObject15.ChildList	Custom Objects 15
OrderItem	CustomObject4.ChildList	Custom Objects 04
OrderItem	CustomObject5.ChildList	Custom Objects 05
OrderItem	CustomObject6.ChildList	Custom Objects 06
OrderItem	CustomObject7.ChildList	Custom Objects 07
OrderItem	CustomObject8.ChildList	Custom Objects 08
OrderItem	CustomObject9.ChildList	Custom Objects 09
Partner	AccreditationRequest.ChildList	Accreditation Requests
Partner	ActivityClosedChildList	Completed Activities
Partner	ActivityOpenChildList	Open Activities
Partner	Application.ChildList	Applications
Partner	AppointmentOpenChildList	Open Appointments
Partner	Audit Trail.ChildList	Audit Trail
Partner	BrokerProfile.ChildList	Broker Profiles
Partner	CourseEnrollment.ChildList	Course Enrollments
Partner	CoursePartner.ChildList	Course Partners
Partner	CRMODLS_BusinessPlan.ChildList	Business Plans
Partner	CustObj1ChildList	Custom Objects 01
Partner	CustObj2ChildList	Custom Objects 02
Partner	CustObj3ChildList	Custom Objects 03
Partner	CustomObject10.ChildList	Custom Objects 10

Object System Name	Child Applet Id	Child Applet Name
Partner	CustomObject11.ChildList	Custom Objects 11
Partner	CustomObject12.ChildList	Custom Objects 12
Partner	CustomObject13.ChildList	Custom Objects 13
Partner	CustomObject14.ChildList	Custom Objects 14
Partner	CustomObject15.ChildList	Custom Objects 15
Partner	CustomObject4.ChildList	Custom Objects 04
Partner	CustomObject5.ChildList	Custom Objects 05
Partner	CustomObject6.ChildList	Custom Objects 06
Partner	CustomObject7.ChildList	Custom Objects 07
Partner	CustomObject8.ChildList	Custom Objects 08
Partner	CustomObject9.ChildList	Custom Objects 09
Partner	DealRegistration.ChildList	Deal Registrations
Partner	ExamPartner.ChildList	Exam Partners
Partner	ExamRegistration.ChildList	Exam Registrations
Partner	Fund Request.ChildList	Fund Requests
Partner	MDFRequest.ChildList	MDF Requests
Partner	Partner Book.ChildList	Books
Partner	PartnerAccountChildList	Partner Accounts
Partner	PartnerAddress.ChildList	Addresses
Partner	PartnerAttachmentList	Attachments
Partner	PartnerBookChildList	Partner Organization Books

Object System Name	Child Applet Id	Child Applet Name
Partner	PartnerCampaign.PartnerChildList	Partner Campaigns
Partner	PartnerContactChildListApplet	Contacts
Partner	PartnerFundChildList	Partner Funds
Partner	PartnerLeadChildList	Partner Leads
Partner	PartnerNoteChildList	Notes
Partner	PartnerOpportunityChildList	Partner Opportunities
Partner	PartnerPlan.PartnerChildList	Partner Plans
Partner	PartnerProgramChildList	Program Memberships
Partner	PartnerRelationshipChildList	Partner Relationships
Partner	PartnerRoleChildList	Partner User Roles
Partner	PartnerTeam.ChildList	Partner Teams
Partner	PartnerType.ChildList	Partner Types
Partner	Policy.Carrier.ChildList	Policy: Carrier
Partner	Policy.ChildList	Policies
Partner	Service Request.ChildList	Service Requests
Partner	SPPartner.ChildList	Partner Special Pricing Requests
Partner	SPRequest.ChildList	Special Pricing Requests
Partner	TaskOpenChildList	Open Tasks
PartnerType	Partner.ChildList	Partners
Patient	PatientAssetChildList	Assets
Patient	PatientContactChildList	Relationships



Object System Name	Child Applet Id	Child Applet Name
Patient	PatientNoteChildList	Notes
Patient	PatientTeamChildList	Patient Team
Policy	Activity.ChildList	Activities
Policy	ActivityClosedChildList	Completed Activities
Policy	AppointmentOpenChildList	Open Appointments
Policy	Audit Trail.ChildList	Audit Trail
Policy	Claim.ChildList	Claims
Policy	Coverage.ChildList	Coverages
Policy	Custom Object 1.ChildList	Custom Objects 01
Policy	Custom Object 2.ChildList	Custom Objects 02
Policy	Custom Object 3.ChildList	Custom Objects 03
Policy	CustomObject10.ChildList	Custom Objects 10
Policy	CustomObject11.ChildList	Custom Objects 11
Policy	CustomObject12.ChildList	Custom Objects 12
Policy	CustomObject13.ChildList	Custom Objects 13
Policy	CustomObject14.ChildList	Custom Objects 14
Policy	CustomObject15.ChildList	Custom Objects 15
Policy	CustomObject4.ChildList	Custom Objects 04
Policy	CustomObject5.ChildList	Custom Objects 05
Policy	CustomObject6.ChildList	Custom Objects 06
Policy	CustomObject7.ChildList	Custom Objects 07

Object System Name	Child Applet Id	Child Applet Name
Policy	CustomObject8.ChildList	Custom Objects 08
Policy	CustomObject9.ChildList	Custom Objects 09
Policy	InsuranceProperty.ChildList	Insurance Properties
Policy	Lead.ChildList	Leads
Policy	Opportunity.ChildList	Opportunities
Policy	Policy Book.ChildList	Books
Policy	Policy.SelfChildList	Policies
Policy	PolicyAttachment.ChildList	Policy Attachments
Policy	PolicyHolder.ChildList	Policy Holders
Policy	Service Request.ChildList	Service Requests
Policy	TaskOpenChildList	Open Tasks
PolicyHolder	Audit Trail.ChildList	Audit Trail
Portfolio	ActivityClosedChildList	Completed Activities
Portfolio	ActivityOpenChildList	Open Activities
Portfolio	AppointmentOpenChildList	Open Appointments
Portfolio	Audit Trail.ChildList	Audit Trail
Portfolio	CustObj1ChildList	Custom Objects 01
Portfolio	CustObj2ChildList	Custom Objects 02
Portfolio	CustObj3ChildList	Custom Objects 03
Portfolio	CustomObject10.ChildList	Custom Objects 10
Portfolio	CustomObject11.ChildList	Custom Objects 11

Object System Name	Child Applet Id	Child Applet Name
Portfolio	CustomObject12.ChildList	Custom Objects 12
Portfolio	CustomObject13.ChildList	Custom Objects 13
Portfolio	CustomObject14.ChildList	Custom Objects 14
Portfolio	CustomObject15.ChildList	Custom Objects 15
Portfolio	CustomObject4.ChildList	Custom Objects 04
Portfolio	CustomObject5.ChildList	Custom Objects 05
Portfolio	CustomObject6.ChildList	Custom Objects 06
Portfolio	CustomObject7.ChildList	Custom Objects 07
Portfolio	CustomObject8.ChildList	Custom Objects 08
Portfolio	CustomObject9.ChildList	Custom Objects 09
Portfolio	FinancialAccount.ChildList	Financial Accounts
Portfolio	FinancialPlan.ChildList	Financial Plans
Portfolio	PortfolioBookChildList	Books
Portfolio	PortfolioContactChildList	Contacts
Portfolio	PortfolioSubAccountsChildList	Portfolio Sub-Accounts
Portfolio	PortfolioTeamChildList	Portfolio Team
Portfolio	TaskOpenChildList	Open Tasks
PriceList	Account.ChildList	Accounts
PriceList	Order.ChildList	Orders
PriceList	Partner.ChildList	Partners
PriceList	PriceListLineItem.ChildList	Price List Line Items

Object System Name	Child Applet Id	Child Applet Name
PriceList	SPRequest.ChildList	Special Pricing Requests
Product	PriceListLineItem.ChildList	Price List Line Items
ProductIndication	Audit Trail.ChildList	Audit Trail
Program	Application.ChildList	Applications
Program	Audit Trail.ChildList	Audit Trail
Program	CustomObject10.ChildList	Custom Objects 10
Program	CustomObject11.ChildList	Custom Objects 11
Program	CustomObject12.ChildList	Custom Objects 12
Program	CustomObject13.ChildList	Custom Objects 13
Program	CustomObject14.ChildList	Custom Objects 14
Program	CustomObject15.ChildList	Custom Objects 15
Program	CustomObject4.ChildList	Custom Objects 04
Program	CustomObject5.ChildList	Custom Objects 05
Program	CustomObject6.ChildList	Custom Objects 06
Program	CustomObject7.ChildList	Custom Objects 07
Program	CustomObject8.ChildList	Custom Objects 08
Program	CustomObject9.ChildList	Custom Objects 09
Program	DealRegistration.ChildList	Deal Registrations
Program	Fund Request.ChildList	Fund Requests
Program	MDFRequest.ChildList	MDF Requests
Program	Opportunity.ChildList	Opportunities

Object System Name	Child Applet Id	Child Applet Name
Program	ProgramAttachment.ChildList	Partner Program Attachments
Program	ProgramBookChildList	Books
Program	ProgramMembershipChildList	Program Memberships
Program	SPRequest.ChildList	Special Pricing Requests
Quote	Audit Trail.ChildList	Audit Trail
Sales Assessment Template	AssessmentCriteriaChildList	Criteria
SampleRequest	Audit Trail.ChildList	Audit Trail
SampleRequest	SampleRequest Book.ChildList	Books
SampleRequest	SampleRequestItem.ChildList	Sample Request Items
SampleRequest	SampleRequestTeam.ChildList	Sample Request Teams
SampleRequestItem	Audit Trail.ChildList	Audit Trail
Service Request	ActivityClosedChildList	Completed Activities
Service Request	ActivityOpenChildList	Open Activities
Service Request	AppointmentOpenChildList	Open Appointments
Service Request	CustObj1ChildList	Custom Objects 01
Service Request	CustObj2ChildList	Custom Objects 02
Service Request	CustObj3ChildList	Custom Objects 03
Service Request	CustomObject10.ChildList	Custom Objects 10
Service Request	CustomObject11.ChildList	Custom Objects 11
Service Request	CustomObject12.ChildList	Custom Objects 12
Service Request	CustomObject13.ChildList	Custom Objects 13

Object System Name	Child Applet Id	Child Applet Name
Service Request	CustomObject14.ChildList	Custom Objects 14
Service Request	CustomObject15.ChildList	Custom Objects 15
Service Request	CustomObject4.ChildList	Custom Objects 04
Service Request	CustomObject5.ChildList	Custom Objects 05
Service Request	CustomObject6.ChildList	Custom Objects 06
Service Request	CustomObject7.ChildList	Custom Objects 07
Service Request	CustomObject8.ChildList	Custom Objects 08
Service Request	CustomObject9.ChildList	Custom Objects 09
Service Request	OracleSocialNetwork.ChildList	Social
Service Request	ServiceRequestTeam.ChildList	Service Request Teams
Service Request	ServiceRequestBookChildList	Books
Service Request	ServiceRequestFACHildList	Attachments
Service Request	SolutionChildList	Solutions
Service Request	SRAuditTrailChildList	Audit Trail
Service Request	SRCallScriptChildList	Call Scripts
Service Request	SRCustSatSurveyChildList	Customer Satisfaction Surveys
Service Request	SRNoteChildList	Notes
Service Request	TaskOpenChildList	Open Tasks
SharedAddress	Account.ChildList	Accounts
SharedAddress	Audit Trail.ChildList	Audit Trail
SharedAddress	Channel Partner.ChildList	Dealers

Object System Name	Child Applet Id	Child Applet Name
SharedAddress	Contact.ChildList	Contacts
SharedAddress	Custom Object 1.ChildList	Custom Objects 01
SharedAddress	Custom Object 2.ChildList	Custom Objects 02
SharedAddress	Custom Object 3.ChildList	Custom Objects 03
SharedAddress	CustomObject10.ChildList	Custom Objects 10
SharedAddress	CustomObject11.ChildList	Custom Objects 11
SharedAddress	CustomObject12.ChildList	Custom Objects 12
SharedAddress	CustomObject13.ChildList	Custom Objects 13
SharedAddress	CustomObject14.ChildList	Custom Objects 14
SharedAddress	CustomObject15.ChildList	Custom Objects 15
SharedAddress	CustomObject4.ChildList	Custom Objects 04
SharedAddress	CustomObject5.ChildList	Custom Objects 05
SharedAddress	CustomObject6.ChildList	Custom Objects 06
SharedAddress	CustomObject7.ChildList	Custom Objects 07
SharedAddress	CustomObject8.ChildList	Custom Objects 08
SharedAddress	CustomObject9.ChildList	Custom Objects 09
SharedAddress	Partner.ChildList	Partners
SmartCall	SmartCallBookChildList	Books
SmartCall	SmartCallProdDetailChildList	Products Detailed
SmartCall	SmartCallPromItemDropChildList	Promotional Items
SmartCall	SmartCallSampDropChildList	Samples Dropped

Object System Name	Child Applet Id	Child Applet Name
SocialMedia	Audit Trail.ChildList	Audit Trail
SocialMedia	Service Request.ChildList	Service Requests
SocialProfile	Audit Trail.ChildList	Audit Trail
Solution	AccreditationSolution.ChildList	Accreditation Solutions
Solution	Audit Trail.ChildList	Audit Trail
Solution	CertificationSolution.ChildList	Certification Solutions
Solution	CourseSolution.ChildList	Course Solutions
Solution	CRMOD_LS_MessagingPlan.ChildList	Messaging Plans
Solution	CRMOD_LS_MsgPlanItem.ChildList	Messaging Plan Items
Solution	CRMOD_LS_MsgPlnRel.ChildList	Messaging Plan Item Relations
Solution	CustObj1ChildList	Custom Objects 01
Solution	CustObj2ChildList	Custom Objects 02
Solution	CustObj3ChildList	Custom Objects 03
Solution	CustomObject10.ChildList	Custom Objects 10
Solution	CustomObject11.ChildList	Custom Objects 11
Solution	CustomObject12.ChildList	Custom Objects 12
Solution	CustomObject13.ChildList	Custom Objects 13
Solution	CustomObject14.ChildList	Custom Objects 14
Solution	CustomObject15.ChildList	Custom Objects 15
Solution	CustomObject4.ChildList	Custom Objects 04
Solution	CustomObject5.ChildList	Custom Objects 05



Object System Name	Child Applet Id	Child Applet Name
Solution	CustomObject6.ChildList	Custom Objects 06
Solution	CustomObject7.ChildList	Custom Objects 07
Solution	CustomObject8.ChildList	Custom Objects 08
Solution	CustomObject9.ChildList	Custom Objects 09
Solution	ExamSolution.ChildList	Exam Solutions
Solution	Solution Book.ChildList	Books
Solution	SolutionFACChildList	Attachments
Solution	SolutionRelatedChildList	Related Solutions
Solution	SRChildList	Service Requests
SPRequest	Activity.ChildList	Activities
SPRequest	ActivityClosedChildList	Completed Activities
SPRequest	AppointmentOpenChildList	Open Appointments
SPRequest	Audit Trail.ChildList	Audit Trail
SPRequest	Custom Object 1.ChildList	Custom Objects 01
SPRequest	Custom Object 2.ChildList	Custom Objects 02
SPRequest	Custom Object 3.ChildList	Custom Objects 03
SPRequest	CustomObject10.ChildList	Custom Objects 10
SPRequest	CustomObject11.ChildList	Custom Objects 11
SPRequest	CustomObject12.ChildList	Custom Objects 12
SPRequest	CustomObject13.ChildList	Custom Objects 13
SPRequest	CustomObject14.ChildList	Custom Objects 14

Object System Name	Child Applet Id	Child Applet Name
SPRequest	CustomObject15.ChildList	Custom Objects 15
SPRequest	CustomObject4.ChildList	Custom Objects 04
SPRequest	CustomObject5.ChildList	Custom Objects 05
SPRequest	CustomObject6.ChildList	Custom Objects 06
SPRequest	CustomObject7.ChildList	Custom Objects 07
SPRequest	CustomObject8.ChildList	Custom Objects 08
SPRequest	CustomObject9.ChildList	Custom Objects 09
SPRequest	SPPartner.ChildList	Partner Special Pricing Requests
SPRequest	SPRequest Book.ChildList	Books
SPRequest	SPRequestAttachment.ChildList	Special Pricing Request Attachments
SPRequest	SPRequestLineItem.ChildList	Special Pricing Products
SPRequest	SPRequestTeam.ChildList	Special Pricing Request Teams
SPRequest	TaskOpenChildList	Open Tasks
Task	ActionContactChildList	Contacts
Task	ActionFACHildList	Attachments
Task	ActionUserChildList	Users
Task	ActivityAssessmentChildList	Activity Assessments
Task	ActivityBookChildList	Books
Task	Audit Trail.ChildList	Audit Trail
Task	CRMOD_LS_Transactions.ChildList	Sample Transactions

Object System Name	Child Applet Id	Child Applet Name
Task	CRMODLS_PCD_MSGRSP.ChildList	Message Responses
Task	CRMODLS_Signature.ChildList	Signature
Task	CustObj1ChildList	Custom Objects 01
Task	CustObj2ChildList	Custom Objects 02
Task	CustObj3ChildList	Custom Objects 03
Task	CustomObject10.ChildList	Custom Objects 10
Task	CustomObject11.ChildList	Custom Objects 11
Task	CustomObject12.ChildList	Custom Objects 12
Task	CustomObject13.ChildList	Custom Objects 13
Task	CustomObject14.ChildList	Custom Objects 14
Task	CustomObject15.ChildList	Custom Objects 15
Task	CustomObject4.ChildList	Custom Objects 04
Task	CustomObject5.ChildList	Custom Objects 05
Task	CustomObject6.ChildList	Custom Objects 06
Task	CustomObject7.ChildList	Custom Objects 07
Task	CustomObject8.ChildList	Custom Objects 08
Task	CustomObject9.ChildList	Custom Objects 09
Task	Fund Request.ChildList	Fund Requests
Task	Order.ChildList	Orders
Task	SampleRequest.ChildList	Sample Requests
UserAdmin	AdminDelegatedFromChildList	Delegated From Users

Object System Name	Child Applet Id	Child Applet Name
UserAdmin	AssignedBooksChildList	Assigned Books
UserAdmin	Audit Trail.ChildList	Audit Trail
UserAdmin	DefaultBookObjChildList	Default Book by Record Type
UserAdmin	DelegateChildList	Delegated To Users
UserAdmin	DTAuditHistoryChildList	Audit
UserAdmin	LoginHistoryChildList	Sign In History
UserAdmin	QuotaChildList	Quotas
UserAdmin	UserDivision.ChildList	User Divisions
UserOwner	Audit Trail.ChildList	Audit Trail
UserOwner	DelegateChildList	Delegated To Users
UserOwner	DelegatedFromChildList	Delegated From Users
UserOwner	DTAuditHistoryChildList	Audit
UserOwner	LoginHistoryChildList	Sign In History
UserOwner	QuotaChildList	Quotas
UserOwner	UserDivision.ChildList	User Divisions
Vehicle	Audit Trail.ChildList	Audit Trail
Vehicle	Auto Vehicle Book.ChildList	Books
Vehicle	CustObj1ChildList	Custom Objects 01
Vehicle	CustObj2ChildList	Custom Objects 02
Vehicle	CustObj3ChildList	Custom Objects 03
Vehicle	CustomObject10.ChildList	Custom Objects 10

Object System Name	Child Applet Id	Child Applet Name
Vehicle	CustomObject11.ChildList	Custom Objects 11
Vehicle	CustomObject12.ChildList	Custom Objects 12
Vehicle	CustomObject13.ChildList	Custom Objects 13
Vehicle	CustomObject14.ChildList	Custom Objects 14
Vehicle	CustomObject15.ChildList	Custom Objects 15
Vehicle	CustomObject4.ChildList	Custom Objects 04
Vehicle	CustomObject5.ChildList	Custom Objects 05
Vehicle	CustomObject6.ChildList	Custom Objects 06
Vehicle	CustomObject7.ChildList	Custom Objects 07
Vehicle	CustomObject8.ChildList	Custom Objects 08
Vehicle	CustomObject9.ChildList	Custom Objects 09
Vehicle	Service Request.ChildList	Service Requests
Vehicle	VehicleContactChildList	Contacts
Vehicle	VehicleFinInfoChildList	Financial Information
Vehicle	VehicleSalesHistChildList	Sales History
Vehicle	VehicleServHistChildList	Service History



# 44 Troubleshooting Oracle Migration Tool On Demand

## Troubleshooting Oracle Migration Tool On Demand

This appendix contains problem solving and troubleshooting information for Oracle Migration Tool On Demand client. It contains the following topics:

- [Auditing and Log Files](#)
- [Troubleshooting](#)

### Auditing and Log Files

All Web service operations in the customer test environment are audited. All successful operations as well as processing errors, such as Request Size exceeded, Invalid SOAP request, rate-limit error, and so on, are audited. For information about where you can view the audit records and the log files that are generated for migration operations, see [Auditing and Log Files](#).

### Troubleshooting

The following table describes possible error conditions and their remedies.

Error Message or Condition	Cause	Remedy
<pre>&lt;java:string xmlns:java="" java:io""&gt;com.bea.xml.XmlRuntimeException: error: cvc-maxLength-valid.1.1: string length (77) is greater than maxLength facet (75) for string75 in namespace.</pre>	<p>A field's display name exceeds the maximum length allowed.</p>	<p>Review the display names specified and make sure none of them exceed the maximum length allowed.</p>
<pre>&lt;?xml version = '1.0' encoding = 'UTF-8'?&gt;  &lt;env:Fault xmlns:xsi=""http://www.w3.org/2001/XMLSchema-instance"" xmlns:env=""http://schemas.xmlsoap.org/soap/envelope/"" xmlns:ns2=""urn:/ crmondemand/xml/pagelayout/pagelayoutrelatedinformation/query"" xmlns:xsd=""http://www.w3.org/2001/XMLSchema"" xmlns:ns1=""urn:/ crmondemand/xml/pagelayout/pagelayoutrelatedinformation/ data"" xmlns:ns0=""urn:crmondemand/ws/odesabs/pagelayout/ pagelayoutrelatedinformation/""&gt;&lt;faultcode xmlns=""&gt;env:Server&lt;/ faultcode&gt;&lt;faultstring xmlns=""&gt;Invalid input value 'Cust related info for Contract' for 'RelatedInformationLayoutName'(SBL-ODS-50854)&lt;/ faultstring&gt;&lt;faultactor xmlns="" /&gt;&lt;/env:Fault&gt;</pre>	<p>The related information page layout was not migrated before the upsert was performed.</p>	<p>Migrate the related information page layout before performing the upsert.</p>

Error Message or Condition	Cause	Remedy